Informed Filler®

User's Manual

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Introduction

In this chapter:

Introduction

With the advancement of computer technology and forms software, electronic forms offer an efficient, intelligent, and secure alternative to the traditional paper based forms systems used in many organizations. Shana Corporation offers complete cross-platform electronic forms solutions for each step in the paper forms process—from the design stage to "fill, sign, and send."

Informed Filler and Informed Designer together provide everything you need to design, distribute, fill, route, approve, submit, and track electronic forms.

Informed Filler

In many organizations, "fill, sign, and send" is the most common process for a form. For example, a purchase order form might be filled out, signed by an approving manager, and sent to the purchasing department to be entered into the organization's accounting or database system. Traditionally, this process has been performed using a paper forms system. This manual will show you how anything you do with a paper form can be done faster, more efficiently, and more accurately with Informed Filler.

Informed Filler is a powerful tool for processing electronic forms—or templates— that have been created with Informed Designer. Using Informed Filler, you can electronically fill out and store any type of form, from expense forms and purchase orders to time cards and human resource forms. As you enter data, "intelligent" features such as calculations, database lookups, choice lists, and error checking work automatically to make filling out forms as fast and accurate as possible. You can also use Informed Filler's spell checking feature to further ensure the accuracy of your data.

With paper forms, associated information such as blueprints or diagrams are often attached to a form using a paper clip. Informed Filler provides the same capability by allowing you to attach electronic documents to electronic forms. The attached files become part of a record, just like the information in each of the blanks on the form.

Once forms are filled out, you can sign them electronically with a digital signature, and mail them to other users right from within Informed Filler using your existing e-mail system. When the form is completed and approved, you can submit it directly into an accounting system, database, or information system, eliminating the costs of rekeying data.

In a paper forms system, forms are stored in file cabinets or in stacks on someone's desk, making it difficult and tedious to find a particular form or forms. Informed Filler's powerful database features let you store your forms electronically, making it easy for you to search for, sort, and group records. And for better integration with other information systems, Informed Filler can import and export information in standard file formats.

The Informed Filler Manual Set

The Informed Filler manual set is designed to provide you with a complete reference to the features and functionality of Informed Filler. The manuals combine text and graphics to thoroughly document every aspect of the software. In addition to your Informed Filler Users Manual, the set also contains the *Informed Filler Getting Started Guide*. This guide provides you with instructions on installing and registering Informed Filler, and also describes the minimum hardware and software configurations required to use the Informed Filler application.

About This Manual

This manual provides a complete reference to Informed Filler. General topics are organized in the following chapters:

- Chapter 1, "Overview," provides an introduction to the concept of electronic forms. It describes the Informed products and explains how each application works and integrates with the others to provide a complete electronic forms solution. The flexible nature of Informed's architecture and how it can be customized to fit your organization's environment is also discussed.

- Chapter 2, "Manipulating Documents," teaches you about the different types of Informed documents. Instructions are provided on how to open, close, and copy documents. You'll also learn how to change a document's password.

- Chapter 3, "Filling Out Forms," instructs you in how to fill out a form. You'll learn about entering information into new or existing forms—or records, and about using the variety of intelligent features that make it easy for you to fill out a form.

- Chapter 4, "Using Digital Signatures," discusses Informed's digital signature capabilities; specifically, how digital signatures work and the steps necessary to sign forms and verify digital signatures. You'll also learn how to verify the authenticity of associated form templates.

- Chapter 5, "Attachments," provides information about how to attach files to records. The Attachments window is described as well as the Attach and Extract commands.

- Chapter 6, "Spell Checking," explains how to use Informed Filler's spell checking feature to ensure the accuracy of data entered in cells. Setting spelling preferences and spell checking multiple records are also discussed.

- Chapter 7, "Annotation," shows you how to include annotated text or voice notes in addition to the information that you enter in the cells on your forms.

- Chapter 8, "Manipulating Records," describes how to add, remove, find, change, duplicate, and tag records. The Record List is also described in detail.

■ Chapter 9, "Printing Forms," explains how you print forms with Informed Filler. It describes the Page Setup and Print commands as well as various printing options.

■ Chapter 10, "Mailing Forms," describes how you can use electronic mail systems to send forms to other users. This chapter also discusses Informed Filler's routing feature and describes the various e-mail systems supported by Informed.

■ Chapter 11, "Form Tracking," provides information on how to track an electronic form as it moves through your organization.

■ Chapter 12, "Submitting Forms," explains how form data can be electronically submitted to, and stored in, other information systems.

■ Chapter 13, "Exchanging Information," teaches you how to transfer information between different Informed documents, different applications, and even different computers. You'll learn about the Import and Export commands, and the standard file formats that Informed understands.

■ Chapter 14, "Form Template Distribution," describes how form templates can be stored and distributed in your organization, and how they can be accessed by users of Informed Filler. Informed Filler's revision checking feature is also discussed.

Conventions Used in This Manual

This section describes the conventions used in this manual to ensure that you can easily find and understand the information you need to perform specific tasks with Informed Filler.

Finding Information

In addition to the table of contents at the beginning of this manual, you'll also find a table of contents at the beginning of each chapter, listing the main sections in that chapter. The example below shows the table of contents for Chapter 13, "Exchanging Information."

Inside each chapter, the main topics are highlighted in a gray bar like the one at the beginning of this section, making it easy for you to quickly scan a page to find the topic of your choice. Subsections for each topic are highlighted with a large, bold font.

Notes

Throughout this manual, you'll see paragraphs of text highlighted in gray boxes with the label "Note" in the left margin. These notes contain important information such as warnings, reminders, and specific conditions to be aware of. The following example shows a typical note.

Note   Important information about Informed Filler appears in highlighted gray boxes like this one.

Commands and Control Names

When specific instructions on how to perform a certain task are given in this manual, commands are shown in a different typeface from the rest of the text. The name of the menu where the command is found is also given in each instance. For example, when learning how to attach files to a record, you would read the following text:

"To show the Attachments window, choose **Show Attachments** from the View menu, or click the paper clip indicator on the form window. To close the Attachments window, choose **Hide Attachments** from the View menu, or click the window's close box."

The names of controls such as buttons and settings on dialog boxes are always shown in single quotes. For lengthy control names, this helps to differentiate the control name from the text that surrounds it. For example, when setting preferences for Informed Filler's spell checking feature, you can select the 'Always provide alternative spellings' checkbox.

Cross-platform Notes

Although this manual has tried to be platform neutral, the cross-platform nature of Informed requires that special care be taken when documenting the features of Informed Filler.

Throughout this manual you'll see screens of dialog boxes and windows. Some of the screens show Windows dialog boxes and windows, others are from the Mac OS. In cases where a dialog box or window is substantially different between the two platforms, both versions are shown.

In cases where a specific feature of Informed Filler is only applicable to one platform (Windows or Mac OS), an icon depicting either the Windows or Mac OS platform is displayed in the left margin next to the description of the feature. For example, Chapter 3, "Filling Out Forms," describes entering pictures into a picture cell:

"Informed Filler stores pictures in Windows Bitmap, Windows Metafile, Macintosh PICT, and Encapsulated PostScript.

 The Windows Metafile format is not supported on the Mac OS."

1 Overview

In this chapter:

1 Overview

Like many software products, Informed Filler consists of different components, including an application, documents, preference files, and special files and folders that serve unique purposes. The organization of these components is flexible, allowing for custom configurations to better suit your specific needs.

This chapter describes the different components of Informed Filler and how they are organized. Depending on how forms are designed and administered in your organization, some of the information here might be unnecessary for your use of Informed Filler. Regardless, understanding the information in this chapter can be of benefit to any Informed Filler user.

How Forms are Designed

The design of a form is called a form template. A form template is created using Informed Designer and stored in a form template document. The form designer creates a form template by typing text and drawing graphical objects—like fields and tables—using a variety of drawing tools.

In addition to the graphical appearance of a form, a form template also contains cells. Cells are the placeholders for the information that you enter to fill out a form. To aid you when entering information, the form designer can configure cells to use a variety of "intelligent" features. These include automatic formatting, calculations, error checking, lookups, choice lists, on-line help, and other features that make it faster and more accurate to enter information.

The design of a form template also involves linking the template to other services or systems used in your organization. For example, a template might be linked to an Oracle database so that you can "submit" completed forms electronically, therefore eliminating the need to rekey the form information into other systems. The use of other services such as electronic mail for sending forms, and security services for signing forms with digital signatures is also available.

In addition to customizing a form itself, the form designer can also customize the commands and menus available in Informed Filler's menus. That way, custom commands that are specific to the processing of the form can be added, and unnecessary commands can be removed. The electronic form begins looking more like a custom application rather than a custom form.

Note Since the form designer can customize the menus that you see, any of the menu commands that are described in this manual can be named differently, positioned in a different menu, or even hidden altogether.

Informed Plug-ins

Many of the services that Informed Filler can link to are accessed via Informed plug-ins. An Informed plug-in is a file that contains the code that interacts with a particular service. For example, in order to mail a completed form using a particular e-mail system, you must have the Informed mail plug-in for that e-mail system installed. Informed Filler comes with a variety of plug-ins for accessing e-mail systems, databases, signing services, and other information services.

The table below lists the different types of plug-ins that Informed Filler can take advantage of.

Informed Plug-ins

Plug-in Type	
Mail	Send form templates or completed forms using electronic mail.
Data access	Look up information from a database or data source. Submit completed forms to a database or data source. Obtain unique form numbers from a database or data source. Track forms with a database or data source.
Signing	Authorize and verify form templates using Informed Designer. Sign and verify completed forms.
Data translation	Import, export, or mail form data in a particular data format.
Distribution	Distribute form templates via a particular type of distribution center.
Spelling	Check the spelling of text on your template or the text entered on a completed form using an alternate spell checking system.

Informed plug-ins must be installed in a folder named "Plug-ins." The plug-ins folder must be located in your Informed folder.
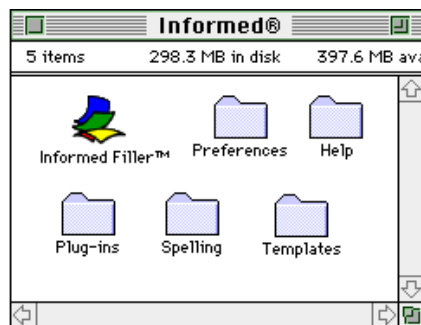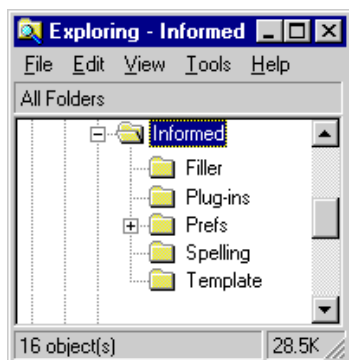
By using plug-ins, Shana can more easily support new types of services as they become available. For example, if a new electronic mail system were developed, Shana could easily enable the mailing of form templates and completed forms using that mail system by simply developing a new mail plug-in.

Distribution of Form Templates

In order to fill out a form of a particular type, Informed Filler must have access to the appropriate form template. There are two basic models for the distribution and storage of form templates. Form templates can be stored in a distributed manner—that is, stored locally on your computer, or they can be stored centrally on a file server and shared among all Informed Filler users.

If you store your form templates locally on your computer, you have the freedom to take your computers anywhere and still have access to the templates you need. A network connection is not necessary to access templates. Furthermore, each time you access a template, it is not at the expense of network bandwidth.

Centralized storage of form templates has converse advantages. Although access to templates requires a network connection, the distribution of a new revision of a template requires only that the form designer replace a single template on the network file server with the new version. You and all other Informed Filler users are instantly up to date since you all share the same template. If form templates are stored locally on your computer, the distribution of a new revision requires that you obtain the new version.

The method with which Informed Filler users access form templates is often determined by the form designer (and possibly involves the input of a network administrator). Many factors, including the size of your organization, your network configuration, and the mobility of all users must be taken into account.

To aid in the distribution of form template, Informed Designer and Informed Filler come with built-in forms distribution features. These features automate the distribution of new templates and revisions of existing templates. With proper configuration by the form designer, you can access templates at one or more distribution centers. A distribution center can be a file server or an FTP server. Since distribution centers are accessed via Informed distribution plug-ins, other types of distribution centers might be supported after this documentation is published.

Once you've obtained a template from a distribution center, Informed Filler will automatically check periodically to see if a new revision of the template is available. If a new revision is available, you are automatically notified when you open or create a data document, and the new revision replaces the previous version.

The Templates Folder

Regardless of whether you access templates on a shared file server or locally on your own computer, Informed Filler needs to know where the templates are located.

Templates are located in the templates folder. On Windows, this folder is named "TEMPLATE." On the Mac OS, the folder is named "Templates." Regardless of platform, the templates folder, by default, is located in your Informed folder.
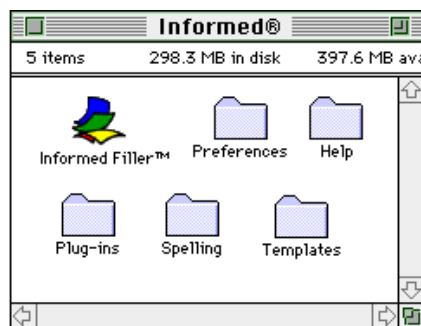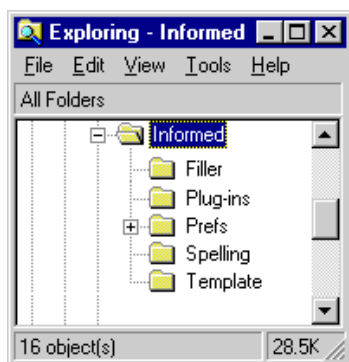
You can change the location of the templates folder using Informed Filler's Preferences command. For information about moving your templates folder, see "Moving Folders," later in this chapter.

In addition to the templates themselves, information about templates is stored in separate template preferences files. These files contain information about your personal preferences. For example, Informed Filler allows you to list the information of multiple forms—or records—in a list format by displaying the Record List window.

You can change which information is included on the Record List and its order and format according to your specific needs and personal preferences. Each different Informed Filler user might want to format the Record List differently.

Since you can share templates among many Informed Filler users, it is important that personal preferences, like the format of the Record List, be stored separate from the template itself. For this reason, Informed Filler maintains a separate preferences file for each template.

Template preferences files are stored in a folder named "TMPLPRFS" (Windows) or "Template Preferences" (Mac OS). This folder is found along with other items in another folder named "PREFS" (Windows) or "Preferences" (Mac OS). Like the templates folder, the default location for the preferences folder (that is, the folder that contains the template preferences folder) is inside the Informed folder.

The preferences folder contains other items in addition to the template preferences folder. The Informed Filler user can store the preferences folder at its default location or at any other location. For information about the other items found in the preferences folder, see "Where Everything Goes" later in this chapter. For information about moving the preferences folder, see "Moving Folders."

Filling Out Forms

To the Informed Filler user, form templates are like hidden files that need not be manipulated directly. Instead, Informed Filler automatically locates and opens templates when needed as you fill out new forms and open previously filled out forms.

When you request a new document, Informed Filler presents a list of available templates to choose from. You select a template and a blank form appears, ready for filling. The information you enter to fill out a form is stored in a form data document. A form data document can store the information for one completed form, or many completed forms. A single completed form is called a record. For casual users who fill out very few forms, it is easiest to store one record in each data document. If you fill out many forms, storing all records for a particular type of form in one data document allows you to take advantage of Informed Filler's powerful database features.

While filling out forms, you benefit from the powerful data entry and "intelligence" features that have been configured by the form designer. Features like automatic formatting, calculations, error checking, lookups, choice lists, and on-line help make it faster and more accurate to enter information.

The entire processing of a form is automated using Informed Filler, from the initiation of a new form, to the approval and submission of the completed form. After entering information, you can sign the form electronically using a digital signature. A digital signature provides a means of later verifying the identity of the person who signed the form and the integrity of the signed data.

If approval of the form is necessary, you can send the completed form to the appropriate person or place using electronic mail. The process of entering and signing information, sending the form to other people, and, if necessary, approving the form continues until the form is complete and approved. The completed form is then submitted electronically or printed.

The flexible nature of Informed makes it ideal for automating both simple and complex forms processes. With the ability to easily exchange information between different forms and different applications, the form designer can design a comprehensive "forms system" that combines and integrates many different types of forms and different applications. Each contributes a particular feature or capability to the solution.

Form Tracking

For many types of forms, processing involves routing the form from person to person for approval purposes. Informed's built-in form tracking capabilities make it easy for you to find out where a particular form is in the routing process.

Whenever you send a form, Informed Filler connects to a central tracking database and records information, including your name and the name of the recipient, the form identification numbers (that is, the type of form and a unique number, such as an invoice number or purchase order number), and the date and time that the form was sent. Other information can be tracked as well.

At any time, you can request the tracking status for any completed form. Informed Filler connects to the tracking database and retrieves the tracking information for the particular form. This information is displayed in a dialog box for your view.

Where Everything Goes

When you install Informed Filler, you are asked to specify a location for the "Informed" folder. The Informed folder contains the Informed Filler application, as well as other important components. The contents of the Informed folder following installation are pictured below.
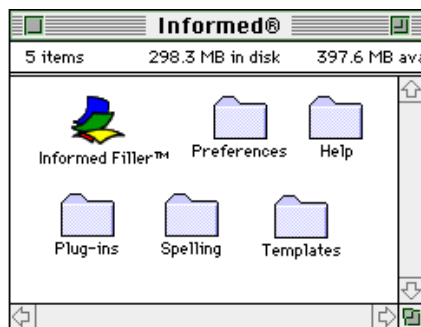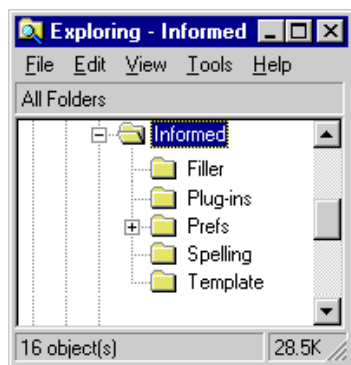
The Informed folder is a special folder. It contains certain items that are required in order for Informed Filler to work properly. Some of the items in the Informed folder can be moved to different locations. The following sections describe the purpose of each item and the possible storage

locations. For information about moving the Informed folder to a different location, please see "Moving Folders" later in this chapter.

Applications

On Windows, the Informed Filler application is comprised of the executable file ("FILLER.EXE") and other associated files. These files are found in the folder named "FILLER". On the Mac OS, the application is a single file and is named "Informed Filler™".

The FILLER folder (Windows) and Informed Filler™ application (Mac OS) can be moved to any location you like. You can store the application locally on your computer, or you can access it from a file server or applications server.

Plug-ins

The plug-ins folder contains Informed plug-ins and associated files. Informed plug-ins provide access to external services such as electronic mail systems and databases. The plug-ins folder must be located inside your Informed folder. See "Informed Plug-ins" earlier in this chapter for more information about plug-ins.

Templates Folder

The templates folder ("TEMPLATE" on Windows, "Templates" on Mac OS) contains the templates available for use with Informed Filler. The location of the templates folder can be changed using Informed Filler's Preferences command. For more information, see "The Templates Folder" earlier in this chapter.

Preferences Folder

The preferences folder ("PREFS" on Windows, "Preferences" on Mac OS) contains the items pictured below.
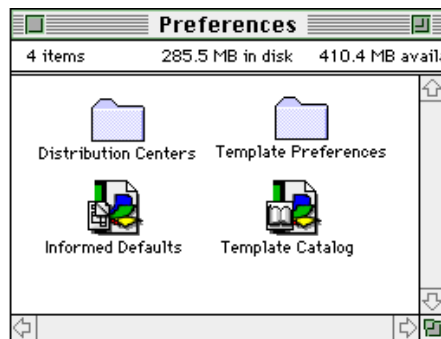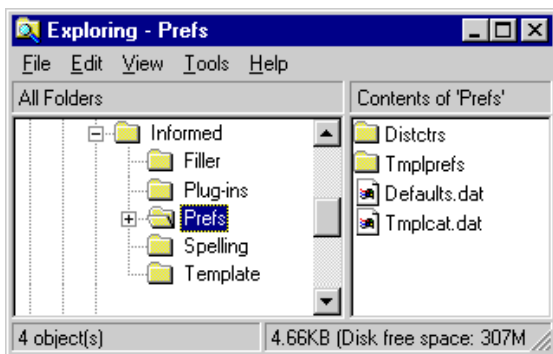
The template catalog ("TMPLCAT.DAT" on Windows, "Template Catalog" on Mac OS) is a file that is maintained by Informed Filler. It contains a list of all of the templates contained in the templates folder. Informed Filler uses the template catalog to quickly find the correct template when the user opens a data or package document.

The template preferences folder ("TMPLPRFS" on Windows, "Template Preferences" on Mac OS) contains template preferences files. Template preferences files are maintained by Informed Filler. Each file contains user-specific preferences for the template of the same name. The purpose of template preferences is described earlier in "The Templates Folder."

The Informed defaults file ("DEFAULTS.DAT" on Windows, "Informed Defaults" on Mac OS) is also maintained by Informed Filler. Like template preferences files, the Informed defaults file contains user-specific information that is associated with one or more templates. As explained in Chapter 3, "Filling Out Forms," of this manual, you can memorize a cell value so that the value is automatically entered each time you create a new blank form. The memorized value is stored in the Informed defaults file.

The distribution centers folder ("DISTCTRS" on Windows, "Distribution Centers" on Mac OS) contains the distribution center profiles needed to access the distribution centers in your organization. These files are created using Informed Designer. For detailed information about distribution center profiles and Informed's built-in forms distribution capabilities, please see Chapter 14, "Form Template Distribution."

Although it is not recommended, you can move the preferences folder to a different location. For more information, please see "Moving Folders" later in this chapter.

On-line Help

If you choose to install on-line help, installation will include the necessary help files. On Windows, the help files are installed in the FILLER folder. On Mac OS, you'll find a folder named "Help" inside the Informed folder. The help files must remain in these locations.

Spell Checking

If you choose to install Informed's spell checking option, you'll see a folder named "Spelling" in your Informed folder. The spelling folder contains the spell checking dictionaries and related files. The spelling folder must remain in the Informed folder.

Informed Preferences

In addition to the items installed in the Informed folder, installation will also place a preferences file among your system related files. On Windows, this file is named "INFORMED.INI" and is found in your Windows folder. On the Mac OS, the file is named "Informed Preferences" and is found in your system's Preferences folder.

The Informed preferences file contains information necessary for Informed Filler to find items such as the Informed folder, the templates folder, and the preferences folder. Other preferences associated with Informed Filler are also stored in the Informed preferences file.

Moving Folders

When you install Informed Filler, the Informed preferences file is automatically updated with the locations of your Informed folder, templates folder, and preferences folder. When you run Informed Filler, it reads these locations from your Informed preferences file in order to locate the appropriate files.

You can move the Informed folder, templates folder, or preferences folder to any location. However, when doing so, you must specify the new location using Informed Filler's Preferences command. Choose **Preferences…** from the Edit menu and click the Folders icon to display the Folders preferences panel.
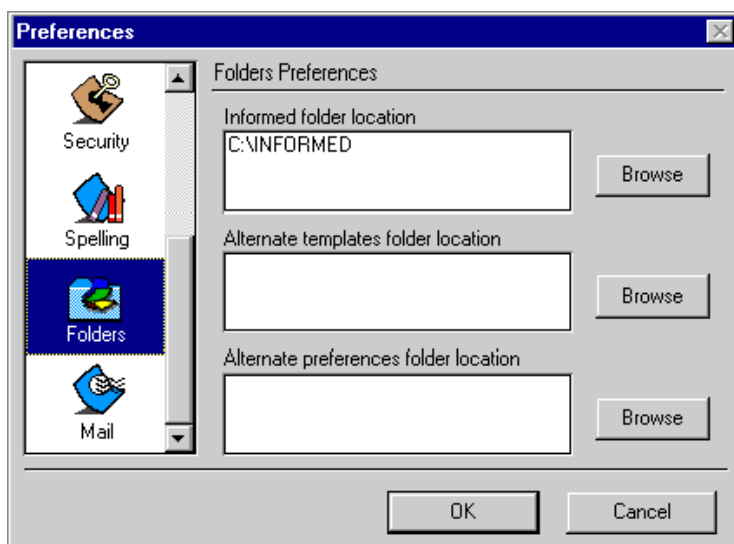
The location of the Informed folder is specified in the 'Informed folder location' text box. The location of the templates folder and preferences folder is assumed to be inside the Informed folder unless otherwise specified in the 'Alternate templates folder location' and 'Alternate preferences folder location' text boxes. That is, if these text boxes are blank, Informed Filler will look for these

folders inside the Informed folder. If you want to move either of these folders to a different location, enter the new location in the corresponding text box.

You can enter a new location by typing in a text box or by clicking the adjacent 'Browse' button. Clicking 'Browse' displays a dialog box allowing you to navigate through the different folders or directories of any available volumes to select the desired location.

If you're using a Windows compatible computer, clicking 'Browse' displays the following dialog box:
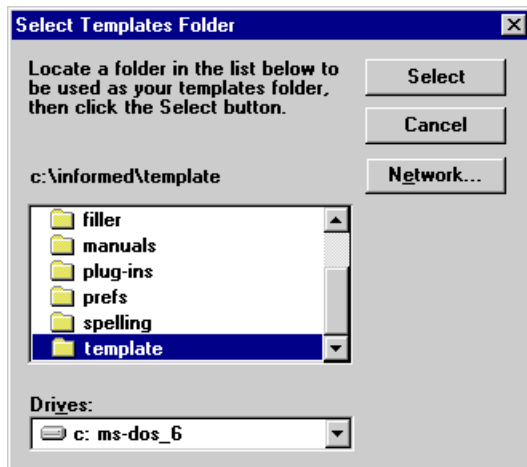
Select a folder in the scrolling list, then click 'Select.'

If you're using a Mac OS compatible computer, you'll see the dialog box shown below.
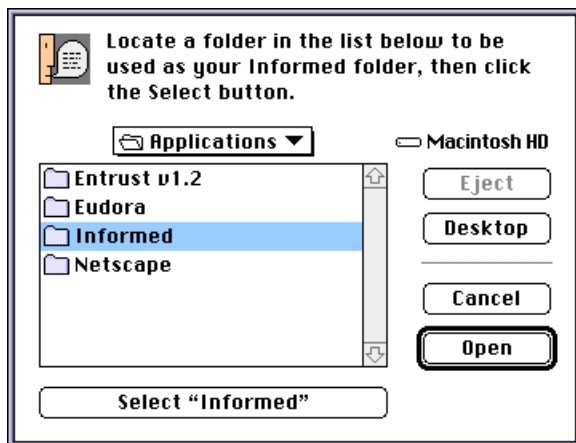
Locate a folder in the scrolling list, the click the 'Select' button.

Note Changing the location of a folder using Informed Filler's Preferences command does not auto-matically move the contents of the folder to the new location. You must do this yourself.

While using Informed Filler, if any of the Informed, templates, or preferences folders cannot be found at their expected locations, you will see a dialog message indicating so.
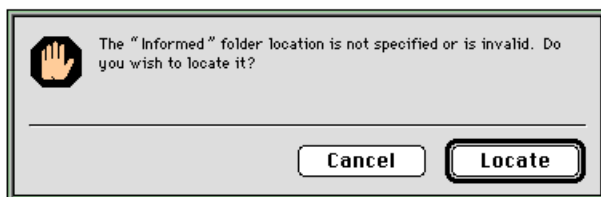
You can look for the missing folder or cancel the operation. If you click 'Locate,' a dialog box appears allowing you to select the folder in its new location. This dialog box is the same one that appears when you click any of the 'Browse' buttons on the Preferences dialog box (see earlier).

Starting Informed Filler

You start Informed Filler the way you do any application. On a Windows compatible computer, you double-click or run the executable "FILLER.EXE." On a Mac OS compatible computer, you dou-ble-click the "Informed Filler®" application icon.

After seeing Informed Filler's welcome screen briefly, you'll be prompted to either select a tem-plate with which to create a new data document, or select a data document to open. Which action depends on the setting of your startup preference. To change this setting, choose Preferences... from Informed Filler's Edit menu. The Preferences dialog box appears.
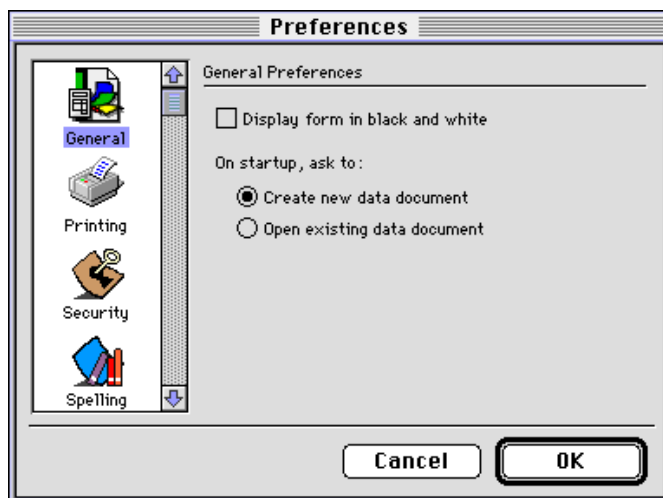
Choose your setting then click 'OK.' To cancel the Preferences command, click 'Cancel' instead. If you change the preference, the new setting will take effect the next time you start up Informed Filler.

The Form Window

Each data document that you create or open appears on your screen in a form window. The form itself appears in the content region of the window. The form window also contains various parts and controls, some of which are standard and appear on most windows. Others are specific to Informed Filler.

Document name

Attachments information

Scroll bars

Page controls

Collection information box

Record information box

If you're using a Mac OS compatible computer, you can further increase the scrolling speed of forms in Informed Filler by taking advantage of any available memory.

The amount of memory required for fast scrolling depends on the dimensions of your form and the monitor setting of your computer. The larger the form and the more grays or colors your monitor is displaying, the more memory you will need. You can, however, minimize the amount of memory required for fast scrolling by selecting a display preference. To do so, choose the **Preferences…** command from the Edit menu to display the Preferences dialog box.
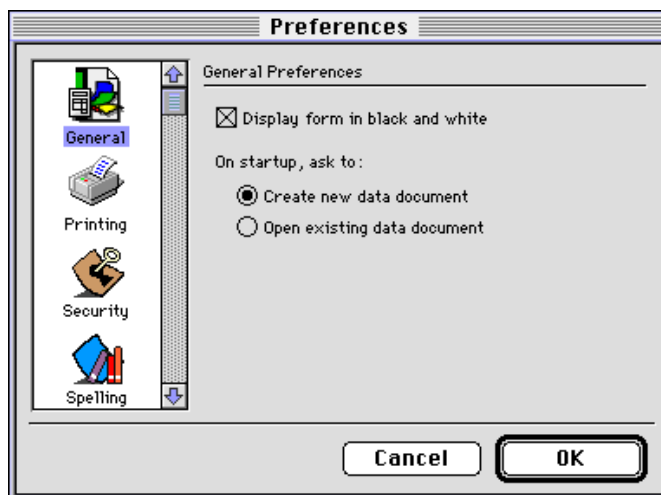
Select the 'Display form in black and white' option. With this option selected, your form will display in black and white, regardless of your monitor setting and the number of colors used on the form. If you do not experience fast scrolling with this preference turned off, you might try turning it on to see the effect. If your monitor setting is set to 'Black & White', selecting this preference will have no effect on the memory required for fast scrolling.

The amount of memory available for fast scrolling depends on the number and size of documents you have open, and the amount of memory you've allocated to Informed Filler. You can change this setting using your computer's Get Info command.

2 Manipulating Documents

In this chapter:

2 Manipulating Documents

This chapter presents information about Informed documents and how they are manipulated. You'll learn about Informed document types and password security, as well as how to create, open, close, and save data documents.

Informed Documents

The term *document* refers to a file that contains information. An Informed document is a file that contains information about a form. There are four types of Informed documents: form template documents, form data documents, package documents, and interchange documents.

Form Template Documents (.ITP)

A form template document contains a form template. A form template is the layout or framework of a form that's created using Informed Designer. It contains all the intelligent features of the form as well as its graphic elements. You fill out a form by entering values in the blanks—or cells— on the template. In order to use templates with Informed Filler, you must place them in a folder named "Template" (Windows) or "Templates" (Mac OS) in your Informed folder. See Chapter 1, "Overview" for more information.

Form Data Documents (.IFM)

A form data document contains only a form's data. When you fill out forms with Informed Filler, the information entered is stored in a form data document. You can store one completed form—or record—in each data document, or you can store many records in a single data document and take advantage of Informed Filler's built-in database capabilities. To open and manipulate a data document, you must have the appropriate template in your templates folder. A data document is the most common format to use when sending forms to other users.

Package Documents (.IPK)

A package document combines a form template and its associated data in a single file. It is created using Informed Filler and is used primarily when you mail a form to someone who doesn't have the corresponding template. When Informed Filler opens a package, the data document and template (if needed) are extracted. If your templates folder does not already contain the template, the one extracted from the package is copied there and opened. The data document is opened into an untitled form window.

Informed Interchange Documents (.IIF)

Informed Interchange documents contain all the data for one or more completed forms (or *records*), and are used primarily for transferring information between different applications, and different

versions of Informed. They are created and read using Informed Filler, and store all types of information including stylized text values, pictures, signatures, and annotations.

Other Interchange Documents

In addition to the Informed Interchange documents, Informed Filler can import and export form data stored in other standard formats, including tab-delimited and comma-delimited text. These formats are used primarily for transferring form data between Informed Filler and other applications.

The Templates Folder

Although you don't create and manipulate form template documents like you do form data documents, template documents are necessary to the use of Informed Filler. Whenever you create a new data document, you're asked to select a template to use. When you open a data document (that is, a document that contains only form data), Informed Filler automatically locates and opens the appropriate template document.

For these reasons, it is necessary that Informed Filler know where to find the templates that you use. By default, Informed Filler finds your templates in a folder named "Template" (Windows) or "Templates" (Mac OS) located in your Informed folder. You can change this location using Informed Filler's Preferences command. For information about moving your templates folder, see "Moving Folders" in Chapter 1, "Overview."

Template Information

Whenever you create a new data document or open an existing data document, the appropriate template is opened and used as a means to present and manipulate the form data. Detailed information about the current template is available by choosing **Template Information...** from the View menu. The Template Information dialog box appears.

```
╔═══════════════════════════════════════════╗
║ ═══════════ Template Information ═══════════ ║
║  ┌ Identification ──────────────────────────┐ ║
║  │ Template name :     Travel Itinerary      │ ║
║  │ Unique template ID :  TI9/96              │ ║
║  │ Revision number :    1                    │ ║
║  └───────────────────────────────────────────┘ ║
║  ┌ Author ───────────────────────────────────┐ ║
║  │ Name :       Tom Szabo                     │ ║
║  │ Organization :  Szabo's Kingston Tours     │ ║
║  └───────────────────────────────────────────┘ ║
║  Description                                   ║
║  ┌────────────────────────────────────────┬─┐ ║
║  │                                        │⇧│ ║
║  │                                        │ │ ║
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║  └────────────────────────────────────────┴─┘ ║
║                              ┌──────────────┐  ║
║                              │     OK       │  ║
║                              └──────────────┘  ║
╚═══════════════════════════════════════════╝
```

The 'Template name' might offer a more descriptive title compared to the filename of the template document. 'Unique template ID' and 'Revision number' are intended to identify the template and its version. Since templates and data documents are separate files, the template ID is stored with each data document so that Informed Filler can automatically identify and open the appropriate template when a data document is opened.

The Name and Organization information identify the person who created the form template. The form designer can also provide a brief description of the template.

Licensing Options

Unlike many software products, Shana offers flexible options for licensing Informed Filler. You can license Informed Filler for use will all types of forms, or form designers can license individual form templates for use with the free version of Informed Filler. Information about licensing and registering Informed Filler can be found in your *Informed Filler Getting Started Guide*.

Depending on the licensing details of your copy of Informed Filler and the form templates you use, you may be restricted to use only certain form templates. If you attempt to use the free version of Informed Filler with a template not licensed for this use, you'll see a message indicating so.

Creating a New Data Document

The data for the forms that you fill out is stored in data documents (see "Informed Documents" earlier in this chapter for a detailed description of data documents). To create a new untitled data document, choose **New Document…** from the File menu. The New Data Document dialog box appears.
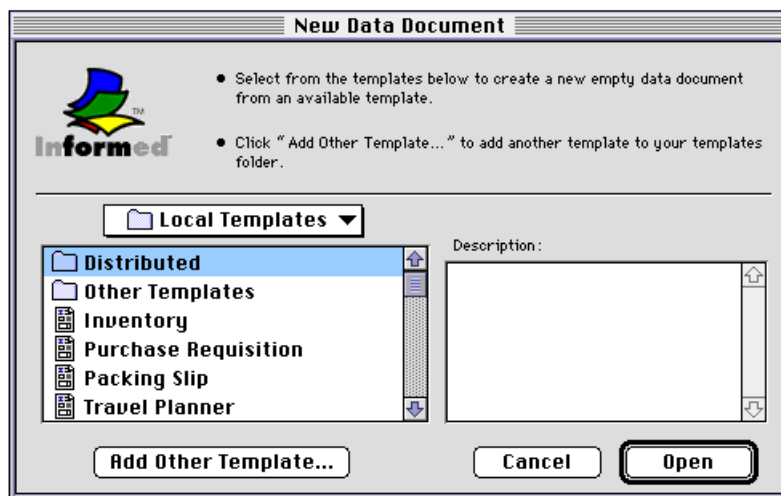
The New Data Document dialog box shows a list of all templates in your templates folder. To select a template, click it in the scrolling list, then click 'New,' or simply double-click it in the list. The templates can be organized hierarchically in folders within the templates folder. To open a folder, select it in the list and click 'Open' or simply double-click the folder.

To select a template that is not in your templates folder, click 'Add Other Template.' The standard Open dialog appears, allowing you to select a template anywhere on any accessible volumes or disks. Informed Filler then copies and places the selected template in your templates folder.

You can also access distribution centers to obtain new templates using controls on the New Data Document dialog. For more information, see "Obtaining a New Template" later in this chapter.

Once you've located the template you would like to use, select it and click 'New.' A new untitled data document for that template is created and displayed in a form window. A blank record is added and any cells configured with default or calculated values are filled in automatically.

Changing the Password

Each data document can have a password. Passwords allow you to protect your data documents by preventing other users from opening and changing them with Informed Filler. If a data document has a non-blank password, you will be prompted to enter it when you attempt to open the document using Informed Filler's Open command (see "Opening a Data Document").

You can change the password for a data document using Informed Filler's Preferences command.

Choose **Preferences...** from the Edit menu. When the Preferences dialog box appears, click the Security icon in the scrolling list. The dialog box changes to show the Security preferences panel.
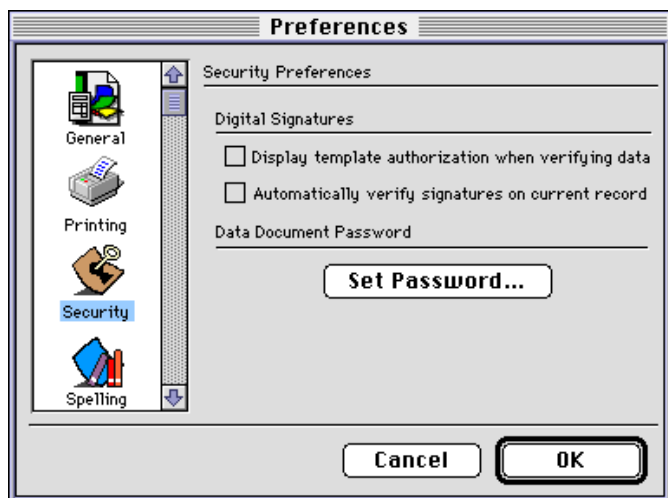
Click the 'Set Password' button. The Set Password dialog box appears.

If you haven't entered a password before, only the 'New password' and 'Confirm password' text boxes are available. If a password already exists, the 'Old password' text box is also available.

If no password exists, type your new password in the 'New password' text box, then press Tab. The insertion point moves to the 'Confirm password' text box. Type the password again, then click 'OK.' Informed Filler will display a message confirming that you have successfully changed the password.

If a password already exists, you must enter that password in the 'Old password' text box before entering the new password.

Opening a Data Document

To open a data document, choose **Open...** from the File menu. The standard Open dialog appears, allowing you to select a data document to open. If you're using a Windows compatible computer, you'll see a dialog box similar to the one below.
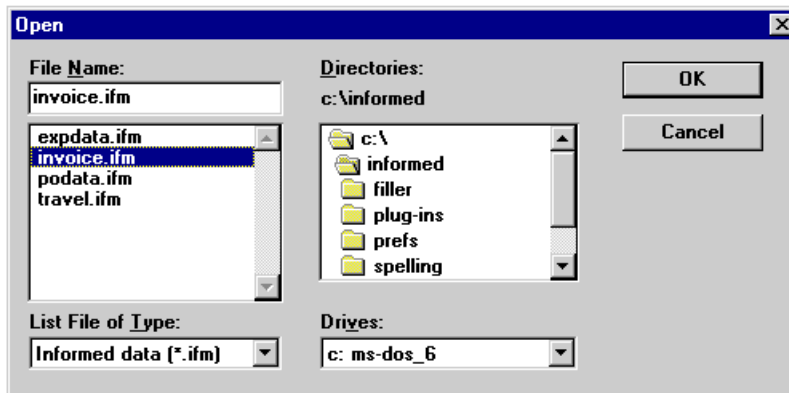
Select a data document, then click 'OK.'

If you're using a Mac OS compatible computer, you'll see a dialog box similar to the one shown below.

Select a data document, then click 'Open.'

If the data document has a password, you'll be asked to enter it.
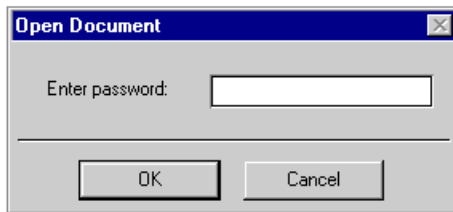
Informed Filler will not open the data document unless the correct password has been entered.

Note Passwords are case sensitive. This means that upper and lower case letters are considered to be different. Be sure that the Caps Lock key on your keyboard is not on when you enter your password.
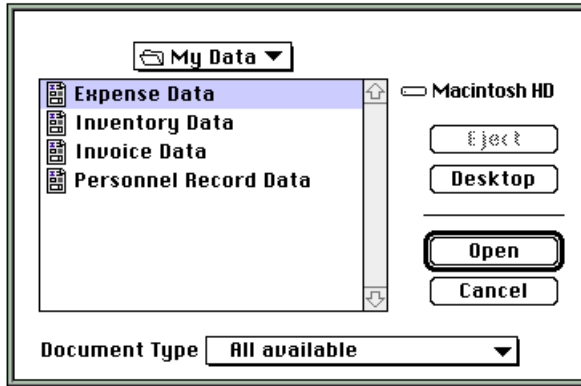
For information about changing your password, see "Changing the Password" earlier in this chapter.

When you open a data document, Informed Filler first examines the document's Template ID. The Template ID identifies which template is needed for displaying and manipulating the contents of the data document. Informed Filler looks in your templates folder for a template with the same Template ID as that in the data document. If found, the data document is opened along with the template and displayed in a form window.

If your templates folder does not contain the needed template, Informed Filler might attempt to obtain one automatically from a distribution center in your organization. Chapter 14, "Form Template Distribution," describes Informed Filler's built-in forms distribution features. If the form designer has made the needed template available in one or more distribution centers, and if the dis-

tribution information is available in the data document that you're attempting to open, Informed Filler will display this message:

> Your Templates folder does not contain the template required to open this data document, but there appears to be one in a distribution center. Would you like me to try to get it?
>
> No   Yes
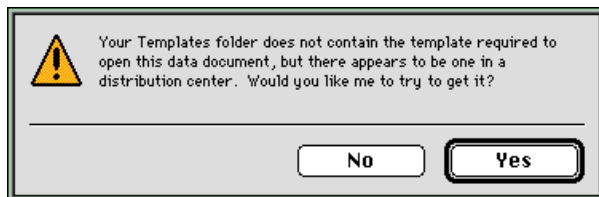
This message indicates that the template you need is available from an accessible distribution center. If you click 'OK,' Informed Filler will place a copy of the template in your templates folder, then continue to open it along with the data document.
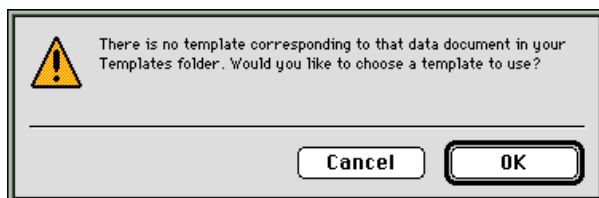
If your templates folder does not contain the needed template, and the template is not available from a distribution center, you'll see a message asking if you'd like to look for the template yourself.

> There is no template corresponding to that data document in your Templates folder. Would you like to choose a template to use?
>
> Cancel   OK

If you have the appropriate template located at a different place on your hard disk, you can locate and select it by clicking 'OK' on the message dialog. To cancel the Open command, click 'Cancel' instead.

You locate and select a template using the standard Windows or Mac OS Open dialog box. When you select the correct template, Informed Filler copies it to your templates folder and then opens it along with the data document.

Opening a Locked Data Document

If you choose to open a locked data document, or a data document that resides on a locked disk or volume, Informed Filler will warn you.

> The selected file is locked or resides on a locked disk. Changes can be saved only using Save As. Would you like to continue?
>
> Cancel   OK
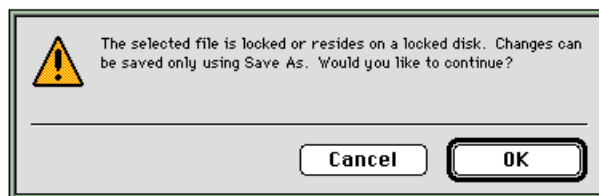
If you continue, the data document will be opened as usual. However, you won't be able to save any changes made. To save any changes, use the Save As command to save the data document, along with any changes made, into a new file. For more information about the Save As command, see "Saving Copies of a Data Document" later in this chapter.

Opening a Data Document in Use

You cannot open a data document that is already open for use by another user or application. If you attempt to do so, a warning message will appear.

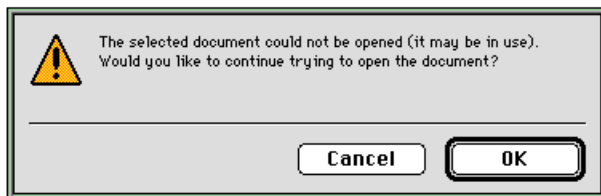If you click 'OK,' another dialog box appears telling you that Informed Filler is waiting for the data document to become available. When the document becomes available, Informed Filler will open it automatically. To cancel the Open command instead, click 'Cancel.'

Opening a Package

As explained earlier (see "Informed Documents"), a package document contains both a form data document and a form template document together in a single file. The purpose of package documents is to be able to save, mail, or transfer completed forms—or records—along with the appropriate form template in a single document.

If a person sends you a form using e-mail, and is unsure whether or not you have the required form template, he or she might send you a package document instead of a data document. That way you will be able to open the form even if you don't have the required template.

When you open a package document, Informed Filler automatically extracts the form data and, if necessary, form template document. If your templates folder already contains a template with a Template ID that matches the one in the data document in the package, then that template is used. That is, the template in the package document is not extracted. If your templates folder does not contain the necessary template, Informed Filler will extract the template from the package, copy it to your templates folder, then open it along with the data document.

Unlike data documents, when Informed Filler opens a package document, it does not open the document in place. That is, once you've opened the package and made changes to the data, saving your changes will not update the original data document in the package. Instead, Informed Filler will

save the data in a new data document, just as though you were saving a new untitled data document. You'll be asked to name the data document and specify its location the way you normally do.

Duplicate Template IDs

It is important that each of the templates in your templates folder have a unique template ID. If two templates have the same template ID, Informed Filler will not know which template to use when you open a data document or package with the same template ID.

If Informed Filler detects two or more templates with the same template ID, it will select and use one of them and mark the others as duplicates. Once a duplicate template has been marked, it will appear with a small warning sign on Informed Filler's New Data Document dialog box.
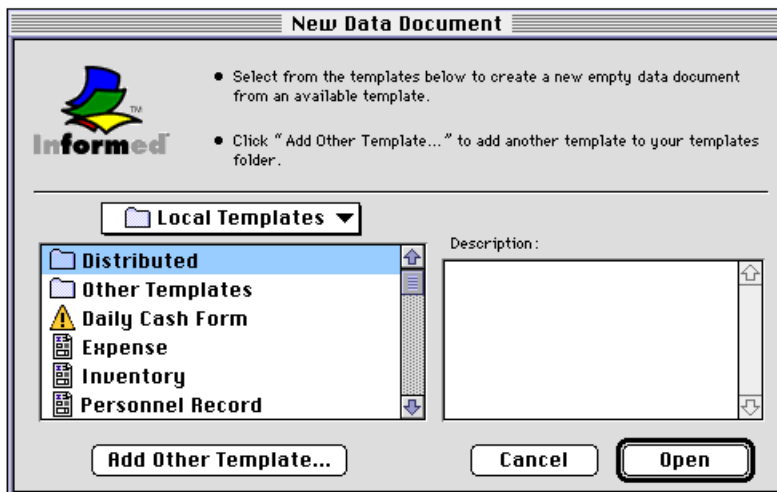
The warning sign is an indication that you should resolve the duplicate templates. That is, you should choose the template that you want to use and remove the duplicates.

Missing Fonts

When you open a template (as a result of opening a form data or package document, or creating a new data document), Informed Filler checks to make sure that the fonts used on the template are available in your system. Different systems on different computers can have different fonts installed. If a template is drawn on one computer, then transferred to different computer, that computer might not have the fonts that were originally used to draw the template.

If Informed Filler detects that at least one font is missing from your system, you'll see the following dialog box.
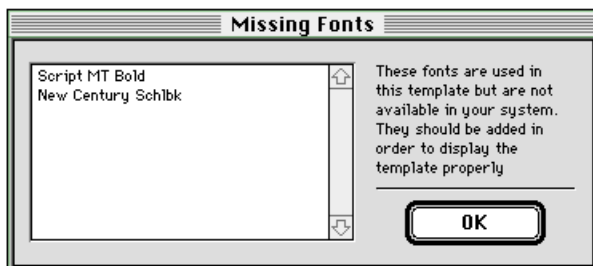
Any text that uses an unavailable font will display using a font that's available in your system.

Closing a Data Document

The Close command closes the currently active data document—that is, the document which corresponds to the front-most form window on your screen.

To close the currently active data document, choose **Close** from the File menu, or click the window's close box. Depending on the kind of document that you're working with, and the work that has been done, one of the following situations will arise.

Closing a New Data Document

If you're closing a new data document that has not been changed, the document is closed immediately. If you're closing a new document to which changes have been made, Informed Filler will warn you to save the changes.
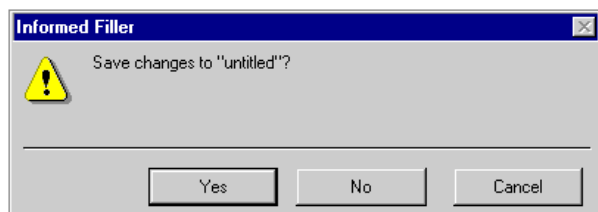
If you're using a Mac OS compatible computer, the button names on this dialog box will be different. Instead of 'Yes', you'll see 'Save', and instead of 'No', you'll see 'Don't Save.' Clicking the 'Yes'/'Save' button displays the Save dialog box. If you're using a Windows compatible computer, you'll see the standard Windows Save dialog box.
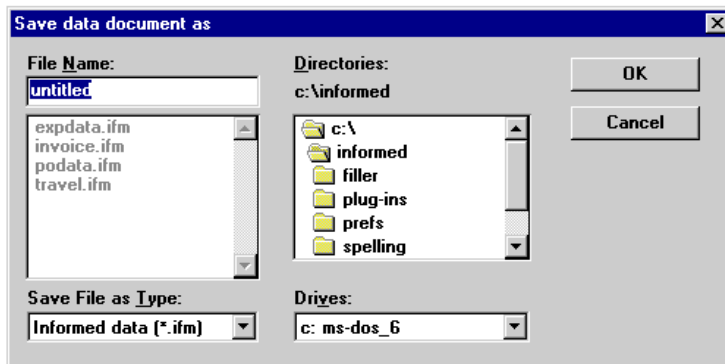
Type the name of the new data document and select a location to store it, then click 'OK.'

If you're using a Mac OS compatible computer, you'll see the standard Mac OS Save dialog box.

Type the name of the new data document and select the location to store it, then click 'Save.' Clicking 'Cancel' instead cancels the Close command and leaves your data document open.
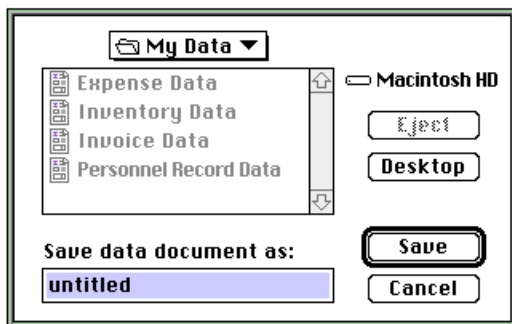
If a document with the name you specify already exists at the selected location, Informed Filler will warn you with options to replace the existing document or to cancel.

Clicking 'No'/'Don't Save' closes the data document without saving any of the work you've done. Clicking 'Cancel' cancels the Close command and leaves your data document open for editing.

Closing an Existing Data Document

When you close an existing data document (that is, a document that was previously opened), Informed Filler first checks to see if you've made changes to the document. If your data document has not changed since you last opened it, then it's closed immediately without warning.

If you've made changes to the document, you'll be asked if you want to save the changes.
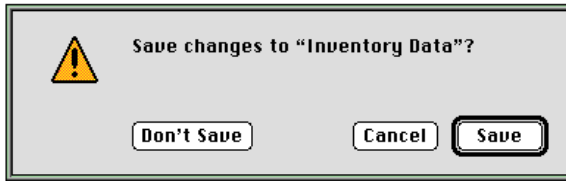
If you're using a Windows compatible computer, the button names on this dialog box will be different. Instead of 'Save', you'll see 'Yes', and instead of 'Don't Save', you'll see 'No.' Click 'Yes'/ 'Save' to save the changes and close the data document. Click 'No'/'Don't Save' to discard the changes and close the document. Click 'Cancel' to cancel the Close command and continue editing your document.

Saving a Data Document

The Save command saves the currently active data document—that is, the document that corresponds to the front-most form window on your screen. This command is available only when changes have been made to the currently active data document.

To save a data document, choose **Save** from the File menu. If the data document corresponds to an existing document (that is, it has been saved at least once before), it will be saved without warning.

If you're saving a new data document for the first time, you'll be asked to name the document and specify the location to store it. Depending on which operating system you're using, you'll see either the standard Windows Save dialog box or the standard Mac OS Save dialog box.

Type the name of the new data document and select the location to store it, then click 'OK.' Clicking 'Cancel' instead cancels the Save command.

Saving Copies of a Data Document

Use the Save As command to save a copy of a data document with a different name, or at a different location. You can also use the Save As command to create a package document containing both the active data document and its accompanying template.

Choose **Save As...** from the File menu. If you're using a Windows compatible computer, you'll see the standard Windows Save dialog box.
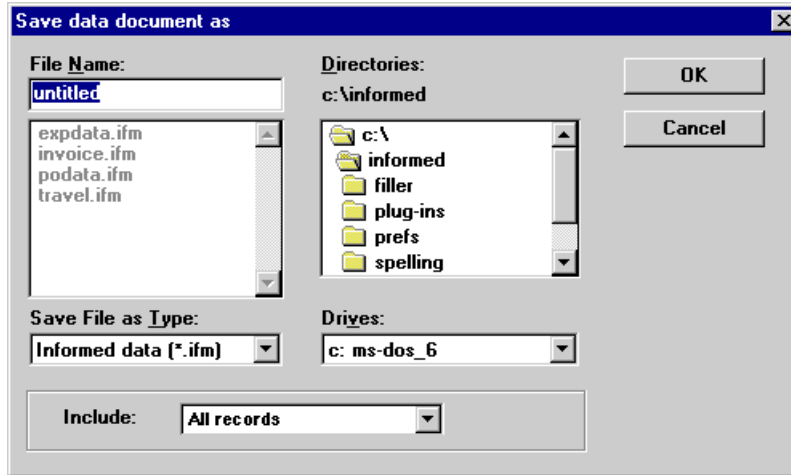
If you're using a Mac OS compatible computer, you'll see the following dialog box.
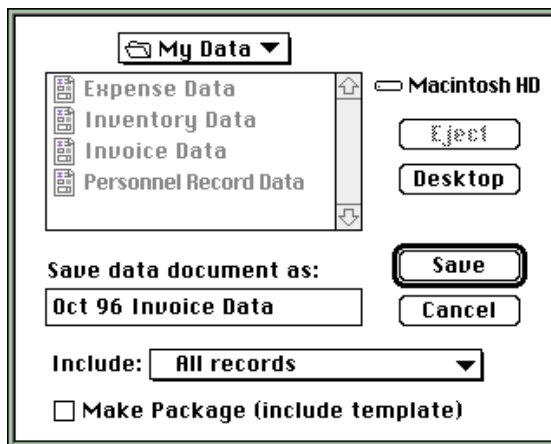
When saving a new data document using the Save As command, you can choose to include the current record only, the currently collected records, or all records. Make your selection from the 'Include' drop-down list.

You can save a new data document or a new package document. If you're using a Windows compatible computer, you make your choice from the 'Save File as Type' drop-down list. If you're using a Mac OS compatible computer, leave the 'Make package (include template)' option unchecked to save a data document. If you check the 'Make package (include template)' option, Informed Filler will create a package document instead.

After saving a new data document, Informed Filler will leave the new document open for editing and close the original document. If you save a new package document, however, the original data document will remain open instead.

Collecting Data Documents

If you're responsible for approving forms, you'll likely receive forms one at a time from other people for approval purposes. If you want to retain a copy of these forms, you might want to collect them into a single data document. That way you can sort the forms, list them on the Record List, and use Informed Filler's other database features.

Informed Filler allows you to import the data from one data document into another. You can do this using Informed Filler's Import command. If you use a Mac OS compatible computer, you can drag a data document onto the form window that corresponds to the data document you want to collect into. For detailed information about Informed Filler's Import command, see "Importing Records" in Chapter 13, "Exchanging Information."

Updating a Data Document

As explained earlier (see "Opening a Data Document" and "Opening a Package"), Informed Filler automatically locates and opens the appropriate form template when you open a data document. Whenever Informed Filler opens a form template (as a result of opening a data or package document), it automatically checks to make sure that the data matches the template.

If the template has changed since the last time you opened the data or package document, or if you've received a data or package document from someone else who has a different version of the template, Informed Filler might notice differences between the data and the template. For example, the template might contain a new cell for which there is no data in the data document. Or maybe a cell's type has changed.

If differences are detected, Informed Filler will update the data to match the template. The time that is takes to update the data depends on the particular differences and the number of records in the data document. You'll see a progress dialog box during the update process.

Obtaining a New Template

Chapter 14, "Form Template Distribution," describes Informed's built-in forms distribution features. After designing a new form template, the form designer can make the template available at one or more distribution centers. Different types of distribution centers are supported, including file servers and FTP servers.

Obtaining a new template from a distribution center is an easy process. As explained earlier in "Opening a Data Document," it can be as simple as clicking 'Yes' on a message dialog. Informed Filler does the rest for you.

The most common method of obtaining a new distributed template is by means of Informed Filler's New Data Document dialog box. This dialog box appears when you choose the New Document command from Informed Filler's File menu.
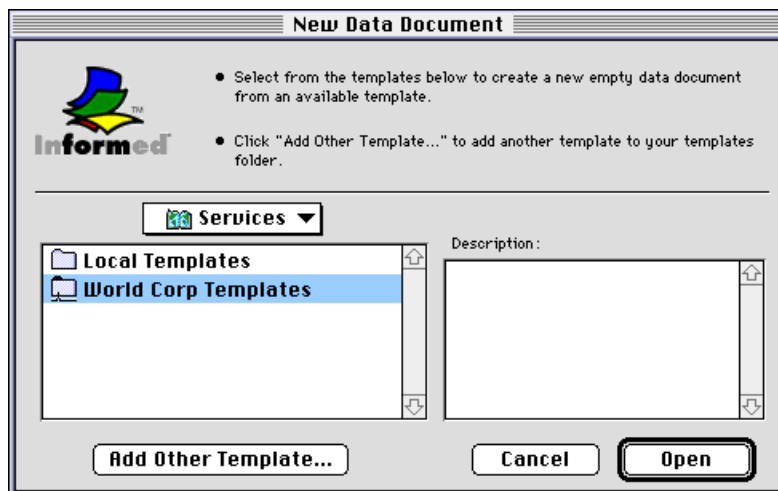
When you choose the New Document command, Informed Filler, by default, shows you the templates that are found in your templates folder. The last item in the drop-down list above the scrolling list is 'Services.' When you select this item, the list changes to show the distribution centers that correspond to the distribution center profiles found in your distribution centers folder (named "DISTCTRS" on Windows, "Distribution Centers" on the Mac OS). A distribution center profile is a file containing the information necessary to identify and connect to a distribution center. See Chapter 14 for more information about distribution center profiles.

To display the templates available at a particular distribution center, select its name in the list then click 'Open.' The scrolling list changes to show the available templates. Templates might be organized in folders. To open a folder, select it in the list and click 'Open,' or simply double-click the folder itself. Once you've located the template that you want, select it in the list then click 'New.' Informed Filler copies the distributed template to your templates folder and opens it, creating a new untitled data document.

Once you've obtained a new template from a distribution center, Informed Filler will automatically notify you when a new version of the template is available. For detailed information about how revision checking works, and the various commands and preferences associated with template distribution, please see Chapter 14, "Form Template Distribution."

3 Filling Out Forms

In this chapter:

3 **Filling Out Forms**

Forms contain areas where you enter information. These areas are called cells. The form designer creates and names each cell using the Informed Designer application. The form designer also specifies the type of information that you can store in each cell, as well as the desired formatting options. Calculations, choices, lookups, and other intelligent features are also added to a form using Informed Designer.

This chapter describes how to fill out a form. You'll learn about entering information and about using the variety of intelligent features that make it easy for you to fill out a form. You can fill out new records or you can edit existing records. For information about creating, finding, removing, duplicating, and sorting records, see Chapter 8.

Activating a Record

Before you can change the information on a form, you must *activate* the current record. While a record is active, you can tab from cell to cell and enter information by typing on the keyboard or pasting from the Clipboard. The figure below shows a form that's inactive (left) and active (right).

The small pencil in the collection information box (see "Collection of Records" in Chapter 8) indicates visually that the record is active. Notice that the Sold To cell is selected and ready to accept information. The form on the left is inactive and therefore has no current cell.

When you open an existing form data document, or when you retrieve a record using the find or browsing commands (see Chapter 8), the current record will be initially inactive. To activate the current record, you can do either of the following:

■ Press the Tab key. When you press Tab, Informed Filler activates the current record and selects the first cell on the current page.

■ Click any cell. Using the mouse, position the pointer over any cell, then press the mouse button. Informed Filler activates the record and shows a blinking insertion point in the cell that you clicked. If you click a checkbox, picture, or signature cell, you'll see a bold, blinking border inside the cell instead of a blinking insertion point.

Once you've activated a record, you can enter information by tabbing from cell to cell and typing or pasting values. See "Entering Information" and "Tab Order" later in this chapter for more information.

Accepting the Current Record

After you've entered a new record or made changes to the information on an existing record, you accept the record by pressing the Enter key on the numeric keypad. The pencil indicator no longer appears and the current cell on the form is deselected. If your Windows keyboard does not contain a numeric keypad, you can press Control-Enter. If your Mac OS computer does not have an Enter key, you can press Command-Return.

Note   If you choose a command such as Print or Close while a record is active, Informed Filler automatically accepts the record before performing the command.

As you'll learn later in this chapter, the form designer can create check formulas for the cells on a form. A *check formula* is a formula that examines the value of a cell to check for errors. When you attempt to accept a record, Informed Filler checks for errors in order to prevent accepting an invalid record. If an error is detected, a beep will sound and the record will remain active with the invalid cell value selected. Correct the mistake, then press the Enter key once again to accept the record.

Entering Information

To fill out a form you enter information into each cell on the form. You can move between cells by pressing keys such as Tab or Shift-Tab, or by clicking a particular cell with the pointer. The cell which is currently selected is called the *current* cell; it's the cell that's ready to accept information. With the exception of checkbox, picture, and signature cells, the current cell will contain either a blinking insertion point or a selected cell value. Selected checkbox, picture, and signature cells contain a bold, blinking outline.

Blinking insertion point

Bold, blinking outline
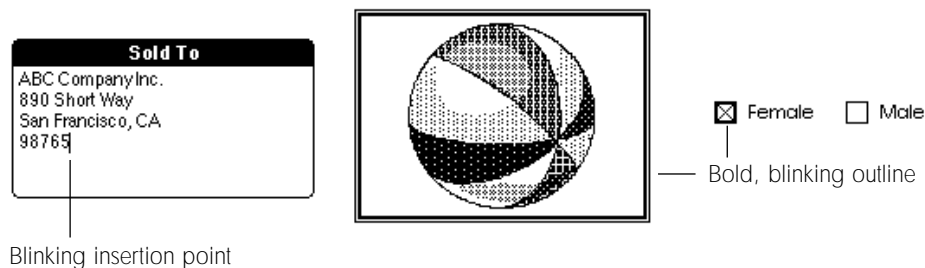
After selecting a cell, you can enter information into it by:

▪ typing
▪ pasting the Clipboard contents (choose **Paste** from the Edit menu)
▪ selecting a choice from a choices palette or drop-down list (for certain cells)

For information about using choice lists, see "Intelligent Features" later in this chapter.

As you enter information, Informed Filler can help by automatically calculating, looking up, and checking values for you. These and other intelligent features make it easier to fill out forms quickly and accurately.

Each cell on your form will accept a particular type of information. The form designer is responsible for properly naming and choosing the most appropriate type for each cell. Informed allows the use of nine different cell types. The following table lists these types with examples.

Cell Types

Cell Type	Examples	
Text	Business form #29	12345 - 123 Street, A Big City
Character	(555) 555-1212	02983-1283
Number	101	$12,550.75
Name	Mr. John Smith	Jones, Mr. Tom F.
Date	10/25/89	Wednesday, November 8, 1989
Time	14:20	03:15:04 PM
Boolean	Yes	
Picture		
Signature	Mary Ann Hancock	

When you enter information into a cell, the value you type or paste must be appropriate for the type of information that the cell holds. For example, you can't type a name into a cell that stores numbers. If you enter an incorrect cell value, Informed Filler will beep and select the value when you attempt to accept the record or tab to a different cell.

Associated with each cell type are a variety of formatting options that make it easier to enter information. Rather than typing formatted values, Informed Filler can do the formatting for you. For example, a cell might be formatted to display numbers with a currency symbol, thousand separators, and two decimal places of accuracy. Informed Filler would automatically convert a typed value, such as '1500,' to the formatted value '$1,500.00.'

Font, Size, and Type Style

The form designer specifies the font, size, and type style attributes used to display information in each cell on the form. When you enter a value in a cell, the information is always displayed according to those specifications. However, by selecting certain options, the form designer can allow you to change these attributes cell by cell.

To change the font, size, or type style, select the value in a cell and choose a new setting from the submenus under the Cell menu. Which submenus are available depends on which options the form designer has allowed. For example, if you are only allowed to change the font and type style, the Size submenu will be unavailable.

The following types styles are not available on Windows compatible computers: Outline, Shadow, Condensed, and Extended.

Display Only Cells

The form designer can prevent you from entering information into any cell by making the cell display only. Display only cells are usually calculated cells that obtain their values from other cells on the form. While tabbing from cell to cell, Informed Filler will skip past any display only cells. You are still permitted, however, to select a display only cell by clicking it with the pointer. To indicate that a cell is a display only cell, a line will appear through the pencil symbol in the collection information box when the cell is selected.


While a display only cell is selected, Informed Filler will beep each time you try to enter or change the cell's value. After three attempts, an alert message will notify you that the current cell is a display only cell.

Entering Text

The text cell type is used for cells that hold textual information such as an address, a comment, or a memo. Formatting options can automatically capitalize letters, words, or sentences in the information you enter.

When you enter information into a cell, you can type more lines than will actually fit in the cell area. When you press Tab to move to the next cell, the information that doesn't fit is hidden.

Text cells can also make use of a formatting option called 'Allow auto-shrink.' If this option is selected, Informed Filler will automatically shrink the type size of the information so that it fits entirely in the cell area.
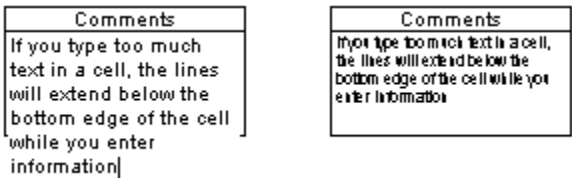
Entering Character Values

The character cell type also stores textual values. However, unlike the text cell type, character values must match a specific format that the form designer defines. The character cell type is used commonly to store information such as telephone numbers, zip codes, or any values that are always formatted exactly the same way.

When you enter a value into a character cell, Informed Filler will verify that the value matches the cell's format. Format characters such as dashes and spaces are automatically entered for you. If you enter an incorrect value, Informed Filler will beep and select the value when you try to move to a different cell or accept the record. A message will appear picturing the required format.

Entering Numbers

The number cell type stores numbers in a variety of formats. Informed Filler automatically formats any number you enter according to the cell's format. Format characters such as the currency symbol, thousand separators, and the decimal point are entered for you.

Entering Names

The name cell type stores names. A name has up to five parts: a prefix (such as Mister or Professor), a first name, a middle name, a last name, and a suffix (such as Junior). Multiple prefixes, middle names, and suffixes are allowed. A cell's name format can include all parts or only selected parts in either full or abbreviated form.

When you enter a name, Informed Filler identifies each part that you type, then formats the name according to the cell's name format. You should enter the parts of a name in the following order: prefix, first name, middle name, last name, then suffix. If you type a comma after the first part, Informed Filler will interpret that part as the last name.

To help identify the parts of a name that you type, Informed Filler refers to a list of known prefixes and suffixes. This list can be found in Appendix A of this manual.

Entering Dates and Times

Informed Filler makes it easy to enter dates and times. Rather than typing a value in a particular format, you can type a date or time in any format you like. For example, to enter the date 'January 1, 1996,' you can type 'jan 1 96' or '1 1 96.' Informed Filler interprets what you type and formats the date or time value according to the particular formatting options of the cell.

Since today's date is often a common entry for a date cell, Informed Filler offers a command that types the current date for you. To enter the current date, select the cell that you want to type in, then choose **Insert Date** from the Edit menu. Informed Filler enters today's date in the correct format.

Entering Boolean Values

A boolean cell can have one of two values. Depending on the format of a boolean cell, the cell's value will display as Yes or No, True or False, or On or Off.

Informed Filler ensures that you enter only values that are appropriate for that format. If you type only part of a value, Informed Filler converts it to its full form. For example, to enter 'No' into a Yes/No style boolean cell, you need only type the letter 'n.' Informed Filler converts the value to 'No' for you.

Entering Checkbox Values

There are eight different checkbox styles. The following table lists each style in its checked and unchecked state.

⊠	Yes	☐	No
⊠	True	☐	False
☑	On	☐	Off
☑	Male	☐	Female
✕	Yes	_	No
✓	On	_	Off
◉	Up	○	Down
■	Yes	☐	No

Rather than typing a value into a checkbox, simply click the cell with the pointer or press any key. The cell's value will toggle between checked and unchecked.

Entering Pictures

You can enter a picture into a picture cell by using the Insert File command (see "Reading Information From a File") or by pasting from the Clipboard. If you are using a Mac OS compatible computer with system software 7.5 or later, you can also enter a picture by using the drag and drop method. Informed Filler stores pictures in Windows Bitmap (.BMP), Windows Metafile (.WMF), Macintosh PICT (.PCT), and Encapsulated PostScript (.EPS).

The Windows Metafile format is not supported on the Mac OS.

Reading Information From a File

Another way to fill in parts of a form is to use the Insert File command. This command allows you to import a text file into a text cell, or a picture into a picture cell. For the command to be available, the current cell must be a text or picture cell, and its 'Display only' option must be turned off.

To insert a file, select the cell, then choose **Insert File…** from the Cell menu. For picture cells only, pressing the Enter (Windows) or Return (Mac OS) key is a shortcut for selecting the Insert File command. The standard Open dialog appears, allowing you to select a file. For text cells, the selected text file will be inserted into the cell at the current insertion point. For picture cells, the selected picture replaces the current picture in the cell.

Setting a Cell's Value for Multiple Records

From time to time you might want to set the value of a single cell on more than one record. For example, if a customer pays ten outstanding invoices with one check, you have to mark each invoice as being paid. Instead of changing the value of the 'Payment Status' cell from 'Unpaid' to

'Paid' on each record individually, you can set the value of the cell for all ten records at once with the Set Value command.

To set the value of a cell on multiple records, find and show that collection of records on the Record List. Make sure that the Record List contains only the records that you want to change (see Chapter 8, "Manipulating Records" for details about the collection of records and using the Record List). With the Record List displayed, select the column that contains the cell you want to change, and choose **Set Value...** from the Cell menu. The Set Value dialog box appears.

With the 'This value' option selected, enter the new value in the text box and click 'OK.' The value of the cell is changed for each selected record. If you are setting the value for many records, Informed Filler displays a progress dialog.

If you want to change the value for a checkbox cell, the Set Value dialog box will look like this:

Instead of typing a value, simply click either the 'Checked' or 'Unchecked' option.

Note   If the selected column on the Record List corresponds to a table cell on the form, the 'This value' option will not be available. You can only use the 'Its calculated value' option. Please see "Calculations" for more details.

You can use the Set Value command to change the value of any cell except for display only cells, or picture and signature cells. If the cell or Record List column that you select is one of these, the Set Value command will be unavailable.

You can also use the Set Value command to reset the value of a calculated cell. For details, see "Calculations" later in this chapter.

Errors When Using the Set Value Command

As you'll learn in "Data Verification" later in this chapter, the form designer can create a check for-mula for any cell so that Informed Filler automatically checks for mistakes when you fill out a form. A *check formula* is a formula that examines a cell value to determine if an error has been made.

When you use the Set Value command to change a cell's value for many records, it's possible that the value you set might be invalid for one or more records in the collection, based on the cell's check formula. If this occurs, Informed Filler leaves those records unchanged and tags them with the tag name "Set Value Errors." For information on tagging records, see "Tagging Records" in Chapter 8.

Scrolling Fields

The form designer can include a scroll bar with any field on the form. A field that includes a scroll bar is called a *scrolling field*. A scrolling field allows you to enter more data than will display in the cell area. You view all the data by scrolling up and down using the scroll bar.

The scroll bar is active, indicating that the cell area contains more data.
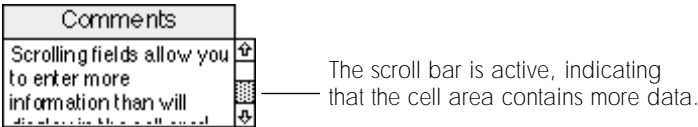
Depending on which option the form designer has chosen, the scroll bar on a scrolling field might be visible at all times, or only when you select or tab into that cell.

When a record that contains scrolling fields is filled out and printed, Informed Filler repeats the printing of the page or pages that contain the scrolling fields, until all the data in those fields has been printed. For example, if page 2 of a two page form contains a scrolling field, Informed Filler will print page 1, then page 2, then page 2 again until all the data in the scrolling field has been printed. The extra copies of page 2 will only contain the data in the scrolling field; all other fields will print blank.

Memorizing Values

Many forms contain information that is specific to the person filling out the form. For example, if you fill out a time card, information such as your name or employee number is always the same. Instead of typing an entry each time, you can type an entry once, and use Informed Filler's Memorize command to "memorize" that value. The next time you add a new record to your data document, the "memorized" value is automatically filled in.

To memorize a value, select the value in the cell, then choose **Memorize** from the Cell menu. The value you are memorizing appears as part of the Memorize command in the Cell menu. For example, if you fill in the value "Lynn Gweenie" in the 'Name' cell on your form, the Memorize command displays as **Memorize "Lynn Gweenie"** when the cell is selected. After choosing the Memorize command, the name "Lynn Gweenie" will be automatically filled in when you add a new record to your data document.

Often different types of forms will contain some common information. For example, both purchase requisition and travel expense forms contain cells for employee information. For a particular employee, this information is the same on every record, both for purchase requisitions and travel expense forms. If the form designer has selected the 'Memorization is shared' option for a particular cell (such as the 'Name' cell), any value that you memorize for that cell is also memorized for the same cell on other forms.

Note   A cell's memorized value is shared only if the 'Memorization is shared' option is selected by the form designer. The memorized value is shared only with cells on other forms that have the same cell name and the 'Memorization is shared' option selected.

To cancel the effect of memorization, simply memorize a blank value.

Tab Order

Each form has a predefined *tab order*. The tab order determines the order in which you move from cell to cell each time you press the Tab key. The form designer sets up the tab order using Informed Designer. You can't change a form's tab order using Informed Filler. The following figure illustrates tab order.

The circled numbers indicate an appropriate tabbing order for this form.

When you fill out a form, pressing the Tab key moves you from one cell to the next in the tab order. Pressing the Shift-Tab key moves you in the reverse direction. If your form contains more than one page, Informed Filler will automatically change pages when you move from a cell on one page to a cell on another.

For cells that cannot have more than one line, pressing Enter (Windows) or Return (Mac OS) has the same effect as pressing Tab.

Informed's Quick-Tab feature allows you to bypass the normal tab order of a form. While filling out a form, pressing F2 (Windows) or Command-Tab (Mac OS) moves you to the next *Quick-Tab* cell in tab order. Pressing Shift-F2 (Windows) or Command-Shift-Tab (Mac OS) moves you to the previous Quick-Tab cell instead. Like the tab order of a form, you can't change the Quick-Tab cells using Informed Filler. Quick-Tab cells are specified using Informed Designer.

The first row of the first column cell in every table is automatically a Quick-Tab cell. You can therefore automatically move from table to table on your form by pressing either of the F2/Command-Tab or Shift-F2/Command-Shift-Tab keys. The first field cell following a table is also a Quick-Tab cell.

The form designer might also have configured conditional tabs for certain cells on the form. A conditional tab moves you to another area of the form, based on the information that you've entered in the cell you're tabbing out of. For example, the form designer might configure conditional tabs for 'Local' and 'Out of Town' checkboxes on a travel expense form. If you select the 'Local' checkbox and then tab from that cell, you might tab past sections for claiming expenses such as 'Hotel Accommodation' and 'Airline Travel,' and go directly to sections for claiming expenses such as 'Parking' and 'Fuel.'

Filling Out Tables

Each table on your form consists of one or more columns and one or more rows. You fill out a table by tabbing from column to column and row to row, entering information in each cell. The direction that you tab in a table—either across the rows or down the columns—is configured by the form designer.

The form designer also specifies when tabbing will leave a table. Normally, if you are tabbing across the rows, tabbing leaves the table when you tab through one empty row. However, the form designer can also configure the tab order so that tabbing leaves the table after you tab out of the first column of an empty row.

Inserting and Removing Rows

Occasionally you may want to insert or remove a row in a table that already contains information. Informed Filler provides the Insert Row and Remove Row commands specifically for this purpose. As an example, consider the table of information shown in the following figure.

Part	Qty	Description	Price	Amount
A0-003	3	Gadgets	79.23	237.69
A0-041	2	Widgets	771.10	1,542.20
A0-032	1	Light Bulbs	2.50	2.50
A0-007	5	Light Sockets	3.49	17.45
A0-010	2	Light Switches	7.10	14.20

Suppose that you want to add a new row between items A0-032 and A0-007. Simply select any cell in the row containing item A0-007, then choose **Insert Row** from the Edit menu. Informed Filler will move all rows starting at the one containing the current cell down by one, then insert a blank row.

Part	Qty	Description	Price	Amount
A0-003	3	Gadgets	79.23	237.69
A0-041	2	Widgets	771.10	1,542.20
A0-032	1	Light Bulbs	2.50	2.50
A0-007	5	Light Sockets	3.49	17.45
A0-010	2	Light Switches	7.10	14.20

If the last row in the table already contains information, Informed Filler won't let you insert a new row. Instead, you'll see this message:

Informed Filler

❌ The last row of the table is currently filled out. You cannot insert another row.

OK
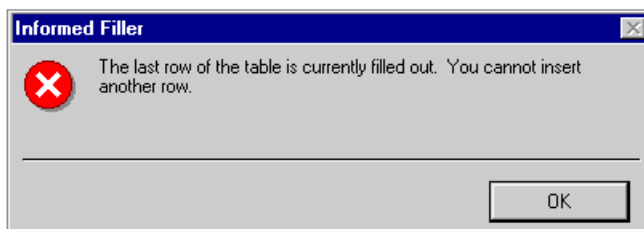
Before you can insert a row in a full table, you have to clear the information on the last row.

To use the Remove Row command, select any cell in the row that you want to remove and choose **Remove Row** from the Edit menu. Informed Filler moves the information in all remaining rows up by one row.

Expandable Rows in Tables

If the form designer has selected the 'Expandable rows' option for a table, the spacing of individual rows can expand if you enter more data than the chosen row spacing can display. With this option selected, all rows in the table are expandable, but only the rows that contain extra data are affected. For example, if only one row in a table contains more information than it could normally display, only that row will expand. The other rows will retain their original spacing.

Qty	Description	Item No.
1	Boot Polish	BP100
1	Recipe for Disaster Cook Book	RD1313
2	Fishing Line	FL222

Only the row with extra information expands. All other rows retain their original spacing.

If all the rows in a table already contain data, Informed Filler will not allow you to expand any rows in the table, since that would cause the last row of the table to disappear. If you try to expand a row when all rows in the table already contain data, you'll be alerted with a message.

Scrolling Tables

The form designer can include a scroll bar with any table on the form. A table that includes a scroll bar is called a *scrolling table*. Informed Filler automatically adds new rows to the scrolling table when you enter more data than the table can display. You can view all the data in the table by scrolling up and down using the scroll bar.

Part No	Description
VC-120	Video Cassette
MP-1000	Microphone
NVG-250	Night Vision Glasses
BT-40	Black Turtleneck

Part No	Description
NVG-250	Night Vision Glasses
BT-40	Black Turtleneck
WC-10	Wire Cutters
M-P120	Map

You can view all the information by using the scroll bar.

Depending on which option the form designer has chosen, the scroll bar on a scrolling table might be visible at all times, or only when you select or tab into the table.

When a form that contains scrolling tables is filled out and printed, Informed Filler repeats the printing of the page or pages that contain the scrolling tables, until all the data in those tables has

been printed. For example, if page 2 of a two page form contains a scrolling table, Informed Filler will print page 1, then page 2, then page 2 again until all the data in the scrolling table has been printed. The extra copies of page 2 will only contain the data in the scrolling table; all other fields will print blank.

Using Buttons

As an alternate method for invoking commands and actions, the form designer can include buttons on your form templates. Clicking a button invokes a command or action according to the button's configuration.

Clicking this button mails the form by invoking Informed Filler's Send command.

Clicking a button will often perform a command just as though you choose the command from a menu. For example, the mail button on the form above provides an alternative method for selecting Informed Filler's Send command. Other buttons might select settings or perform custom actions as specified by the form designer.

Like menu commands, a button is available only when its associated command or action is permitted. For example, if a button is configured to reveal the next record in the data document, this button will be unavailable if the current record is the last record.

Pages of a Form

Each form has a work page and at least one numbered page. The numbered pages contain the form's actual design. For example, the first and second pages of a two page form are the numbered pages. A form can have a maximum of 99 numbered pages, and each page can have as many as 99 parts.

The number of pages and the number of parts per page is determined during the design process using Informed Designer. You can't change these attributes of a form using Informed Filler.

The Work Page

Every form contains one work page. Like the numbered pages of a form, the work page can contain graphics, text, and cells. The only difference between the work page and numbered pages is that the work page doesn't print when you print a form. For instructions on how to print the work page, please see "Printing the Work Page" in Chapter 9.

There are two common uses of the work page.

■ As a place to put instructions or information that's useful while filling out a form. For example, suppose there are special instructions for distributing a form after it has been filled out. You might find these instructions on the work page.

■ As a place to put cells that should not print with the rest of the form. You may need to enter or calculate cells that don't appear on the form (but are required by other calculated cells). For example, you might find the employee wage rates for a check form on the work page.

When you fill out a form, the work page functions like any other numbered page. You can Tab to cells on the work page and change their values. When you print the form, the work page doesn't print.

Changing Pages

As you fill out a form, Informed Filler automatically changes pages when you tab from a cell on one page to a cell on a different page. You can also use the page controls located along the bottom of the document window to change pages.

The control labelled 'W' represents the work page. The rightmost control represents the current numbered page of your form. When the numbered page control is selected, the number inside it corresponds to the current numbered page in the document window.

Using the page controls, you can change pages in either of two ways.

■ Click either arrow next to the numbered page control to change pages in that direction. If you click and hold either arrow, Informed Filler will continue changing pages in that direction until you release the mouse button. If you're on page 1, the left arrow disappears. If you're on the last numbered page of the form, the right arrow disappears.

■ Double-click the numbered page control. The Change Page dialog box appears.
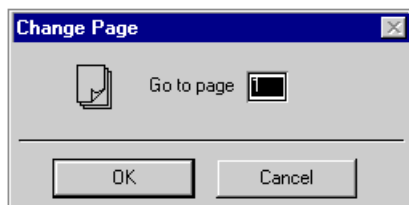
Type the number of the page that you wish to change to, then click 'OK.' Informed Filler moves directly to the requested page.

After changing pages, the number shown in the page control will change to reflect the current page.

To change to the work page, simply click the work page control. Clicking the numbered page control changes back to the numbered pages of the form.

Intelligent Features

Informed's data intelligence features make it easy to fill out forms quickly and accurately. With Informed Filler, forms can automatically format, calculate, look up, and verify data so that you don't have to. The following figure shows a completed form with various intelligent features identified.

As explained in "Informed Documents" (see Chapter 2), the template of a form consists of both the graphical appearance of the form as well as its intelligent features. The form designer sets up the intelligence of a template using Informed Designer.

The remaining sections in this chapter explain how to use the intelligent features of a form.

Calculations

Informed Filler automatically fills in calculated cells. A *calculated cell* is a cell that obtains its value based on other cells on your form. A cell's *calculation formula* is evaluated whenever the value of any cell that participates in the formula changes. For example, suppose that a cell called 'Extension' is calculated as 'Quantity * Price.' Whenever you type a different value in either of the 'Quantity' or 'Price' cells, Informed Filler automatically calculates and displays the new value of 'Extension.'

As explained in "Display Only Cells" earlier in this chapter, the form designer can prevent you from changing the value of any cell—including a calculated cell—by making the cell display only. If a calculated cell is not display only, you can change its value like any other cell. For example, if you have an invoice with a calculated cell called 'Discount,' on occasion you might want to give a customer more than the calculated discount. If the cell is non-display only, you can manually over-ride the calculated value by typing a different value. To change the cell back to its calculated value, simply select the cell on the form or the column on the Record List and choose **Set Value...** from the Cell menu.
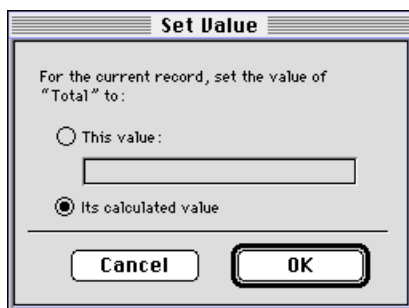
When the Set Value dialog box appears, click the 'Its calculated value' radio button, then click 'OK.'

Data Verification

The form designer can enter error checking rules for any cell so that Informed Filler will automatically check for mistakes as you fill out a form. Each time you enter a cell value, Informed Filler checks the value according to the cell's check formula. A *check formula* is a formula that examines a cell value to determine if an error has been made. For example, a check formula might check to ensure that a cell's value is within a particular range.

Some check formulas detect errors, whereas others warn you of specific conditions. In any case, you'll hear a beep when you try to select a different cell or accept the record. Some check formulas will even present an alert dialog box with a message. Others will add a message to the cell's help dialog (see "Help Messages for Cells"). The following figure shows an alert dialog box.

The shipping charge must be between 2 and 10 dollars.

OK
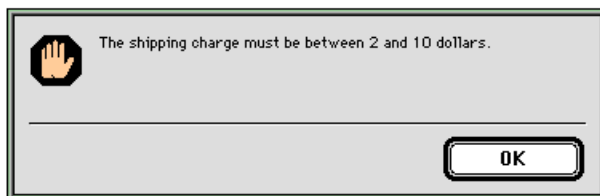
Once an error has been reported, Informed Filler will allow you to move to a different cell even without first correcting the mistake. However, you can't accept, mail, or print a record until all errors have been corrected. If you try to do so, a beep will sound and the record will remain active with the incorrect value selected. An alert dialog box may appear with a message describing the mistake you've made.

Note   If you're unaware of how to correct an error, you can always revert or remove the record. For more information, see Chapter 8, "Manipulating Records."

Whenever an alert dialog box appears, Informed Filler will automatically add the message to the cell's help dialog box. This allows you to later view the alert message by selecting the cell then choosing **Help...** from the Cell menu. See "Help Messages for Cells" later in this chapter for more information.

Choice Lists

Often a cell will take on a variety of common values. For example, the shipping method on an order form might always be Mail, UPS, or Federal Express. The form designer can enter a list of choices for any cell. Instead of typing a cell value, you can simply select a choice.

Depending on how the form designer has configured a cell's choice list, the choices are displayed either in a palette or in a drop-down list.

Choices for 'Ship Method' displayed in a palette
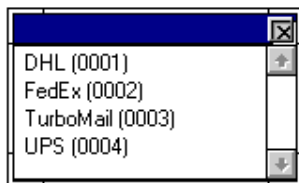
Choices for 'Ship Method' displayed in a drop-down list
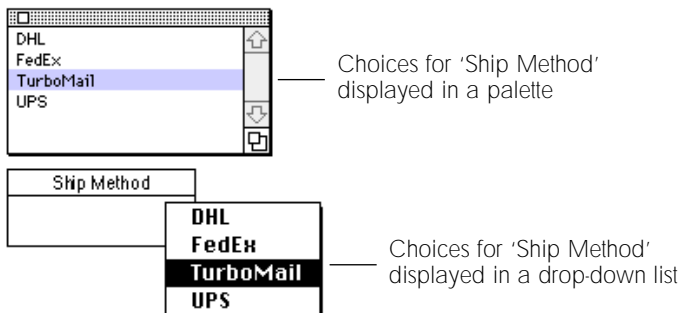
If the choices for a cell are configured to display in a drop-down list, you'll see an arrow on the right side of the cell's title section, indicating the presence of a choice list.

Choice list indicator
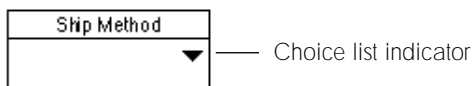
To display the choice list, click the arrow and hold the mouse button down.

Depending on how the form designer has set up the form, choices in a palette will display automatically when you tab into the cell, or you may have to choose **Show Choices** from the View menu. If you show the palette by choosing the Show Choices command, the palette will remain visible until you close it manually by choosing **Hide Choices** or by clicking the palette's close box. If the palette is set to display automatically, Informed Filler will also hide the palette for you automatically when you select a different cell or accept the record.

The form designer can add descriptive text to a cell's list of choices that won't appear in the cell once a choice is made. For example, if you select the choice 'TurboMail (0003),' only the text in parenthesis, in this example '0003,' will appear in the cell.

Selecting a Choice

Depending on whether a choice list is displayed in a drop-down list or in a palette, you use different methods to select a choice.

To make a selection from a drop-down list, simply click the arrow indicator on the cell's title section and drag the mouse until the choice you want is highlighted. When you release the mouse button, your choice appears in the cell.

When choices are displayed in a palette, you can select a choice by double-clicking it in the list or by using the Up and Down arrow keys.

Another convenient way to select a choice from either a choices palette or a drop-down list is to type the first few characters of the value. As you type characters, Informed Filler selects the choice that most closely matches the typed value. For example, suppose that the sales person cell on a sales slip has the choices listed in the following table.

Sales Person Choices

Sales Person Choices
Brown, Tom
Dawson, Greg
Dickens, Sharon
Johnson, Cindy
Murphy, Karen
Smith, John
Young, Kevin

Typing the letter 'D' would select 'Dawson, Greg,' the first choice that starts with that letter. Typing 'Da' would also select 'Dawson, Greg.' However, typing 'Di' would select 'Dickens, Sharon' instead. In each case, Informed Filler automatically copies the entry into the cell as the selection is made.

The only exception to this is when you type the first characters of choices that have descriptive text added to them. For example, if you have TurboMail (0003) as one of the choices, typing the letter 'T' selects the choice in the list but doesn't automatically display the value (0003) until you tab out of the cell.

Once you've selected the correct choice, press Tab to accept the selected choice and move to the next cell. If you press Tab without selecting a choice, Informed Filler leaves the cell blank and moves to the next cell.

Editing a Cell's Choices

Although you can't edit or remove the original choices in a choice list, the form designer can allow you to add extra items to the list of choices for any cell. If adding extra choices to a cell's choice list is allowed, the Extra Choices command under the Cell menu will be available when the cell is selected. To add more choices to a choice list, choose **Extra Choices...** from the Cell menu. The Edit Choices dialog box appears.
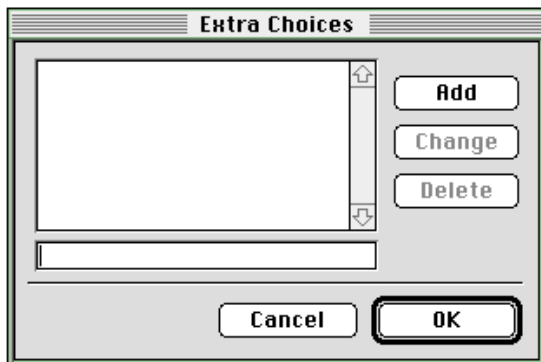
The Edit Choices dialog box contains controls for adding, removing, and changing extra choices. To add a new choice, type the entry in the text box below the scrolling list and click 'Add.' The new choice is added to the list in sorted order. Although there's no practical limit to the number of choices a cell can have, we recommend that you enter no more than 40 or 50.

To change or remove an extra choice, first select the choice by clicking it in the scrolling list; the selected choice appears in the text box. To remove the selected choice, click 'Delete.' To change the selected choice, type the new value then click 'Change.'

After you've entered all choices for the selected cell, click 'OK' to dismiss the Edit Choices dialog box. The next time you tab into that cell, the choice list will show your extra choices as well as the original choices.

Note   When you add extra choices, they are only available for the cell that you added them in. In other words, the extra choices will not appear in other cells, even if they use the same choice list.

Help Messages for Cells

Each cell on a form can display a custom help message created by the form designer. The help message contains useful information or special instructions on filling in the cell. Help messages are displayed on the Help dialog. If you're using a computer with Mac OS System 7 (or later), they also appear in help balloons.

To display the help dialog, first select the cell, then choose **Help...** from the Cell menu, or press Control-? (Windows) or Command-? (Mac OS). The Help Message dialog box appears:
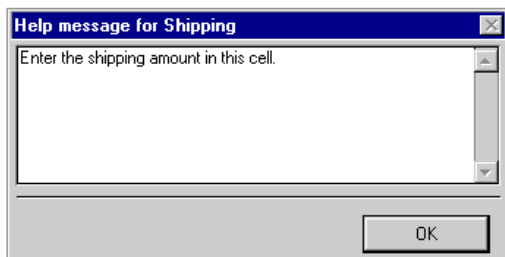
On the Mac OS, to display the Balloon help, choose **Show Balloons** from the Help menu and point at the cell of interest. A balloon appears showing the cell's help message:
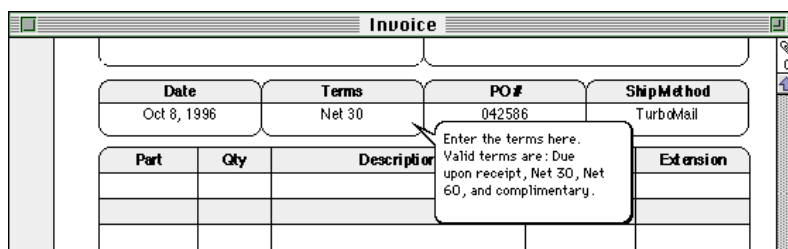
To turn off the Balloon help, choose **Hide Balloons** from the Help menu.

Check Formulas and the Help Dialog

As discussed in "Data Verification," a cell's check formula can append a message to the help message. You might, therefore, see a different message on the help dialog depending on the value of the current cell.

When a check formula uses an alert or help message, the message is added to the cell's custom help message. The check formula message is separated from the cell's help message by a dashed line on the Help dialog.
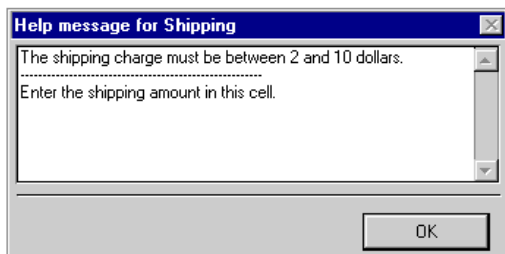
The check formula message will remain part of the help message until you change the cell's value.

Lookups

The form designer can configure forms to look up information so that you don't have to. Entering a part number on an invoice form, for example, could look up related inventory information in another data document or database and fill it in on the form. Lookups reduce the amount of typing necessary to fill out a form and improve the accuracy of the information entered.

Value in lookup cell is searched for.

Company Database

Related information is filled in on the form.
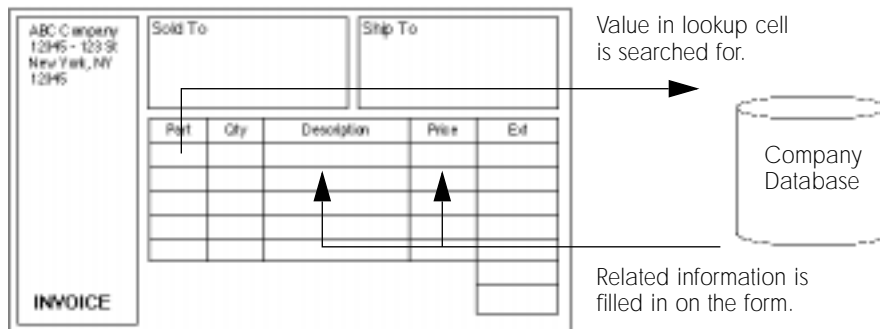
The cell in which you enter information that's looked up is called the *lookup cell*. In the figure above, the part number cell is the lookup cell.

Informed Filler can look up information in other form data documents and in other information systems. An information system can range anywhere from a small database running locally on your computer, to a high capacity, high performance SQL database running on a mainframe. The place where Informed Filler looks up information is called the lookup source. Lookups are configured by the form designer.

Informed Designer and Informed Filler include built-in support for looking up into form data documents, or information available through Mac OS applications that support Apple events or AppleScript. Other types of lookup sources are accessed using Informed data access plug-ins. Data access plug-ins must be installed in your plug-ins folder.

A lookup is performed whenever you enter a value in a lookup cell and press Tab to leave the cell. You might be prompted to enter some information, such as your name and a password, when the lookup is performed. This depends on the particular lookup source and how the connection is configured. The form designer can include the necessary connection information in the form template itself or leave it blank.

For example, for lookups that query an Oracle database, if the form designer did not include a user ID and password in the form template, you'll see the Oracle connection dialog box when the lookup is triggered.

Database Login For "Oracle"
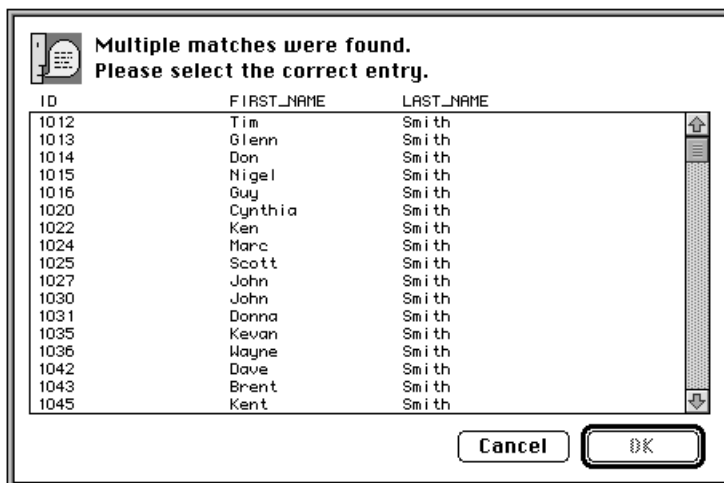
User ID   gWhittaker

Password   ••••••••

Cancel   OK

The exact appearance of the connection dialog box varies slightly depending on the type of lookup source.

When a lookup is performed, the value that you type in the lookup cell is searched for in the lookup source. If a single match is found, the related information is returned and entered automatically on the form. If the search fails, you'll see a message indicating so. If multiple matches are found, you might see a dialog box requesting that you select a single match.

Multiple matches were found.
Please select the correct entry.

ID	FIRST_NAME	LAST_NAME
1012	Tim	Smith
1013	Glenn	Smith
1014	Don	Smith
1015	Nigel	Smith
1016	Guy	Smith
1020	Cynthia	Smith
1022	Ken	Smith
1024	Marc	Smith
1025	Scott	Smith
1027	John	Smith
1030	John	Smith
1031	Donna	Smith
1035	Kevan	Smith
1036	Wayne	Smith
1042	Dave	Smith
1043	Brent	Smith
1045	Kent	Smith

Cancel   OK

If this happens, select the desired match then click 'OK.' To cancel the lookup, click 'Cancel' instead.

Lookup Errors

When you trigger a lookup, it is necessary that the lookup source be available to perform the lookup. If Informed Filler is unable to find or connect to the lookup source, you'll see an error message indicating so.

Depending on the type of lookup source, the specific error message and the options available will vary. For some lookup sources, the error is described and the lookup is canceled. For others, options include skipping the lookup and looking for the lookup source.
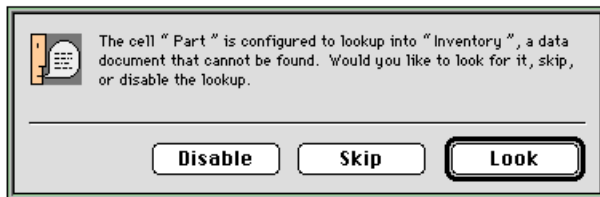
Clicking 'Look' allows you to try and locate the lookup source. For example, if the lookup source is a form data document and Informed Filler cannot find the document, clicking 'Look' on this dialog box allows you to browse any available volumes to locate the document. Clicking 'Skip' ignores the lookup that time only. This means that the error message will appear the next time the lookup is attempted. The 'Disable' option ignores the lookup until the data document is closed and later opened again. For some lookup sources, the 'Look' option is not available. Instead, you'll see a button labeled 'Retry.' Clicking 'Retry' attempts to perform the lookup again.

Form Numbers

Forms such as invoices and purchase orders often contain unique numbers for identification purposes. Each time you fill out a form, you enter a new form number. The form designer can configure a cell that contains the form number to be an auto-incrementing cell—that is, a cell that's automatically assigned a value upon request or when a new record is added to the data document.

Form numbers can be obtained from a variety of sources. For instance, the next available number might be stored in the form template itself, or it can be obtained from another application or data source. Data sources are accessed using Informed's data access plug-ins.

If the auto-incrementing cell obtains its number from another data source, you might be prompted for some information such as a name and password when the form number is requested. This depends on the particular form number source and how the connection is configured. The form designer can include the necessary connection information in the form template itself or leave it blank.

For example, for cells that obtain a value from an Oracle database, if the form designer did not include a user ID and password in the form template, you'll see the Oracle connection dialog box when the auto-increment is triggered.

The exact appearance of the connection dialog box varies slightly depending on the type of form number source.

In cases where the source of your form numbers is unavailable, you can use the Assign Next Value command to obtain values at a later time. For example, suppose you're waiting at an airport while on a business trip and you want to fill out an expense form that gets its number from an Oracle database back at your office. You can fill out the entire form except for the form number. Then, when you return to your office, you can connect to your network and choose **Assign Next Value** from the Cell menu (with the form number cell selected). Informed Filler obtains the next available value from the Oracle database, and fills in the cell on your form.

The Assign Next Value command is also used for cells that are configured to auto-increment manually (that is, only when you request a value). To manually obtain the next available value for a cell, first select the cell, then choose **Assign Next Value** from the Cell menu.

You can manually assign values to multiple records on the Record List. With the collected records displayed in the Record List window, select the column that contains the cells that require values and choose **Assign Next Value** from the Cell menu. Informed Filler obtains the next available values and assigns them to the selected cells. For information on how to find a collection of records and how to use the Record List, see Chapter 8, "Manipulating Records."

Form Number Errors

When a form number is requested, it is necessary that the source of the form number be available to generate the next available value. If Informed Filler is unable to find or connect to the form number source, you'll see an error message indicating so.

Depending on the type of form number source, the specific error message and the options available will vary. For some form number sources, the error is described and the auto-increment is canceled. For others, options include skipping the auto-increment and looking for the form number source.
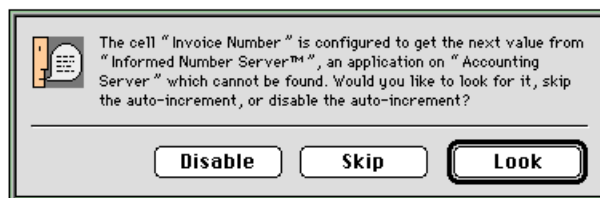
Clicking 'Look' allows you to try and locate the form number source. For example, if the form number source is another application and Informed Filler cannot find the application, clicking 'Look' on this dialog box allows you to browse any available volumes to locate the application. Clicking 'Skip' ignores the auto-increment that time only. This means that the error message will appear the next time a form number is requested. The 'Disable' option ignores the auto-increment until the data document is closed and later opened again. For some form number sources, the 'Look' option is not available. Instead, you'll see a button labeled 'Retry.' Clicking 'Retry' attempts to perform the auto-increment again.

4 Using Digital Signatures

In this chapter:

4 Using Digital Signatures

Approval is often a necessary step in the processing of a form. Traditionally, forms have been approved on paper by signing them with a pen. Today, technology allows us to sign forms electronically with digital signatures. Signing electronically reduces the need to print forms and, in some ways, offers more security than paper signatures.

Informed relies on the digital signature services available via Informed signing plug-ins. Because Informed was developed with an "open architecture," Shana can easily support new signing services as they become available by simply developing new plug-ins. With a signing service installed on your computer, you can sign information electronically. The form designer configures a form for signing by drawing one or more signature cells on the form template. Each signature cell can sign the entire form or only certain parts of the form. With a properly configured form, you can easily sign completed forms and check the validity of signatures.

In addition to signing forms and verifying signatures, you can also verify the integrity of the template you're using.

This chapter describes Informed's digital signature capabilities. You'll learn how digital signatures work and the steps necessary to sign forms and verify digital signatures. You'll also learn how to verify the authenticity of associated form templates.

How it Works

Digital signature technology employs sophisticated encryption algorithms to provide reliable signer identification and fail safe tamper detection. This means that once someone has signed data electronically, the resulting digital signature can be used to:

- verify the identity of the person who signed the data
- detect whether or not the data has changed since it was signed

A digital signature is like a special number that's derived from information about the person signing and the data being signed. This number can reliably identify the signer and detect any changes in the signed data. While the digital signature is stored with the signed data, the data itself is not altered in any way.

Attached to form
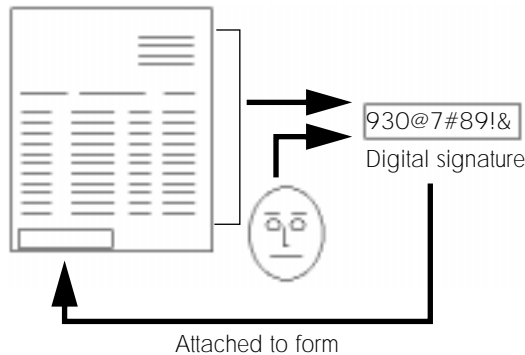
Once a digital signature is created, you can easily verify its integrity by choosing a single command. The verification process involves re-creating parts of the digital signature using current data, then comparing the results with the original signature. If they are not equal, then either the signed data or the digital signature itself has been changed or tampered with.

Before distributing a template for use in an organization, the form designer can authorize the template by signing it with a digital signature. Authorizing templates provides the same authentication and tamper detection for form templates as signing completed forms with Informed Filler does for your form data. At any time, you can find out if a template is valid by verifying its authorization signature (see "Verifying Templates" later in this chapter).

Most security products that provide digital signature services (such as Entrust by Nortel) come with an application or a means of signing entire files. For applications that have not been designed to use signing services, signing the files they create is the alternative for using these signature services.

Signing completed forms with Informed Filler offers significant advantages over signing files. You can sign parts of forms or entire forms, and the way you sign forms is more similar to the way you sign paper forms.

When you sign a form with Informed Filler, only the relevant data is signed. Each digital signature applies to some or all of the data for a single completed form, even if the data document contains many records. This means that you can sign one form, then freely change others without affecting the digital signature on the signed form. To prevent you from unintentionally changing signed data, Informed Filler locks cells once their contents have been signed.

Informed Filler provides other features that make using digital signatures easy and efficient. They include the ability to:

- see exactly which cells a particular signature cell signs
- sign multiple records at the same time
- verify multiple digital signatures at the same time
- automatically verify digital signatures so that you don't have to
- verify the integrity of associated templates

The remaining sections of this chapter provide the details of Informed Filler's digital signature features. For details specific to the different signing plug-ins included with Informed Filler, please see the on-line document "FILLPLG.PDF" (Windows) or "Informed Filler Plug-ins" (Mac OS). This document is automatically installed when you install Informed Filler and is viewed using Acrobat Reader (also included with Informed Filler).

Signature Cells

A signature cell is a cell that can store a digital signature. The form designer configures a form template for electronic signing by drawing one or more signature cells on the form. A signature cell can look just like the space for a signature on any paper form.

Like any cell, a signature cell has a tab position. The tab position determines where the cell appears in the tabbing order. You can select a signature cell like any other cell: by tabbing to the cell, or by clicking the cell with the mouse. When selected, a bold frame flashes in the cell's interior.

Each form can have more than one signature cell, and each signature cell can sign different information. For example, a form that has two sections which are often filled out by two different people could have two signature cells. Each cell would sign only those cells in its respective section. You could even have a third signature cell which signs the entire form including the other two signatures.

| Form with three signatures | 1st signature cell signs 1st section | 2nd signature cell signs 2nd section | 3rd signature cell signs all cells |
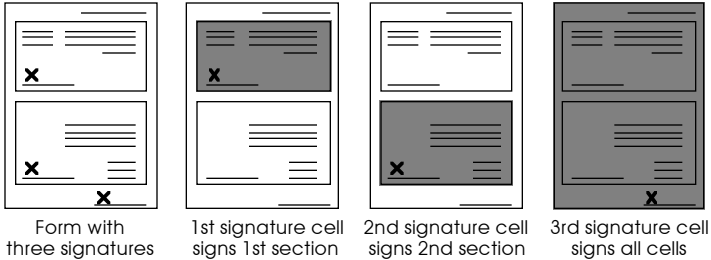
In addition to signing cells, the form designer can configure a signature cell to also sign any attachments. For information on attachments, see Chapter 5, "Attachments."

You can see which cells on a form are signed by a particular signature cell by selecting the cell, then choosing **Show Signed Cells** from the Signatures submenu under Edit. This feature is useful if you are about to sign a form and want to see which cells you are signing, or if you are viewing a form that's already been signed and want to see which cells have been signed by the existing signature.

With the Show Signed Cells option selected, Informed Filler draws a red frame around each signed cell when you select the signature cell. Only those cells which are signed (or will be signed) by the selected signature cell are revealed. To turn the Show Signed Cells option off, choose **Show Signed Cells** again.

Informed Filler also allows you to see whether or not any attachments are signed by a particular signature cell. If the selected signature cell does not contain an actual signature and the cell is configured to sign attachments, you'll see a red frame around both the Attachments window and the

paperclip indicator. This is to indicate that if you sign the record in that signature cell, all of the currently attached files will be signed as well. If the selected signature cell does contain a signature and the cell is configured to sign attachments, you'll see a red frame around only those attached files that were present when the record was signed.

Once a record has been signed with a signature that signs attachments, you can add other attachments without compromising the digital signature. Informed Filler knows which attachments a signature has signed. Once an attachment has been signed, you cannot delete it without first removing the signature.

Verifying Templates

Before distributing a template for use with Informed Filler, the form designer can authorize it so that you can verify its authenticity. Otherwise, the template is vulnerable to tampering. That is, without changing the data on a completed form, a malicious user could alter the template and, in doing so, change the meaning or context of the data.

For example, suppose a loan application must go through two levels of screening before it can be approved. A loans officer interviews the client and then selects a 'Not recommended' checkbox on the application form and signs it with a digital signature. The application then goes to the bank manager who has the final authority to approve or reject the loan application.
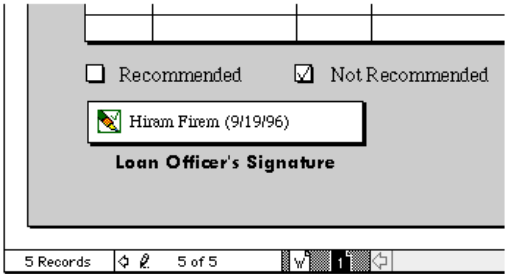
If a person wanted that loan to be approved, he could alter the form template used by the bank manager so that the application appears to have been recommended by the loans officer. To do so, he would simply use Informed Designer to change the title of the 'Not recommended' checkbox field to 'Recommended,' and the 'Recommended' title to 'Not recommended.' When the bank manager views the data with the altered template, it might look like this:

Verifying the loans officer's signature would show that the data on the form has not been altered because the value of the checkbox has not changed. However, by switching the cell titles on the form template, the meaning or context of those values is different. The bank manager would be misled to believe that approval of the loan application was recommended.

In the example above, the tampering is fairly obvious and is used to illustrate the point. In real world situations, tampering could be much more subtle while still causing serious security breaches.

As mentioned previously, the form designer can raise the level of security in the electronic forms process by using digital signatures to authorize the form templates used in an organization. Authorizing templates provides the same authentication and tamper detection for your form templates as signing completed forms with Informed Filler does for form data.

When a form template has been authorized, you can verify it to make sure that it's valid before you fill out your form. Verifying a template reveals the details of the person who authorized it for use. If you verify a template and see that it was authorized by a person without proper authority, it may be an indication that the template is not authentic, and should not be used.

To verify the form template associated with the current data document, choose **Verify Template** from the Signatures submenu under Edit. If you are not already logged onto your signing service, you may be asked to do so. Informed Filler verifies the template and displays the name of the person who authorized it.

If the signature fails to verify, you'll see a different message indicating that the template, or the authorization signature itself, has been altered.

When you sign a completed form with Informed Filler, information about the version of the template you are using and the person who authorized it is included with the signature that results from signing the completed form. This information can be displayed later when verifying the signature on the completed form. See "Signing Forms and Verifying Digital Signatures."

Signing Forms and Verifying Digital Signatures

You can sign forms that contain signature cells using Informed Filler's Sign command. You can sign one record at a time, or you can sign multiple records using the Record List window (see "Working with Multiple Records").

With a signature cell selected, you sign a form by choosing **Sign...** from the Signatures submenu under Edit. As a short cut, you can double-click an empty signature cell or press Enter (Windows) or Return (Mac OS) to choose the Sign command. If you have more than one signing plug-in installed and the form designer has not configured the signature cell to use a particular service, you'll be first asked to select the service you want to use.
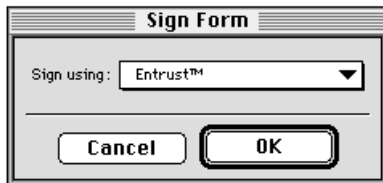
Select the service you want to use from the 'Sign using' drop-down list, then click 'OK.'

If you are not already logged onto the signing service, Informed Filler will request that you identify yourself. The dialog box you see is specific to the signing service used. For some, you have to identify yourself only the first time.
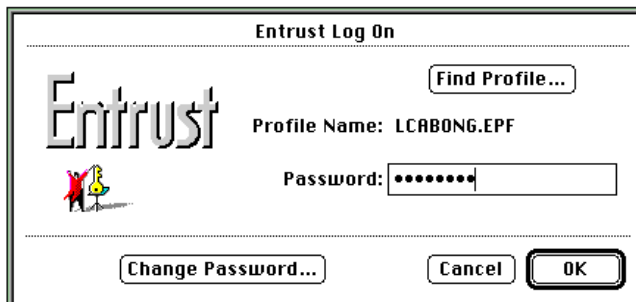
After you've identified yourself, Informed Filler creates the digital signature and stores it in the signature cell. The signature icon and your name appear in the cell's interior. Depending on how the form designer configured the signature cell, you might also see the signing date next to the signer's name.

Note   You should not trust the validity of the name and date displayed in a signature cell. Only by verifying the signature can you be sure of the date and the signer's identity. The signing date may or may not be available depending on the signing service you're using.

Once you've signed a form, Informed Filler automatically locks all signed cells to prevent unintentional changes to the signed information. Although you can select a signed cell, you cannot change its value. The pencil in the collection information box provides a visual indication that the cell is locked.

After signing a form, anyone with the same signature service installed on their computer can verify the digital signature. To verify a signature, select the signature cell and choose **Verify...** from the Signatures submenu.

The verification process involves re-creating parts of the digital signature using current data, then comparing the results with the original signature. If they match, the signature is valid. This means that the person identified on the verification dialog is truly the person who signed the form, and the signed data has not changed in any way.

If verification of a digital signature fails, you'll see a message dialog indicating so. Verification will fail if the originally signed data or the digital signature itself has been changed or tampered with.

Like signing, you might be asked to identify yourself when you choose the Verify command. Depending on your setting of the 'Display template authorization when verifying data' preference, you'll see either a dialog box with additional options, or only the results of verifying the data signature. With the preference turned on, if the digital signature verifies successfully, Informed Filler will display the following dialog box.
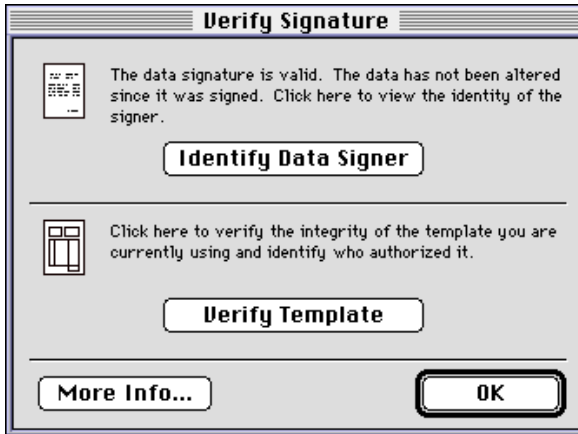
Using the controls on the Verify Signature dialog box, you can identify the person who signed the data, you can verify the template you are currently using, and you can display information about the template that was used when the data was originally signed.

To see the name of the person who signed the data, click the 'Identify Data Signer' button. Informed Filler displays the person's name in a dialog box.
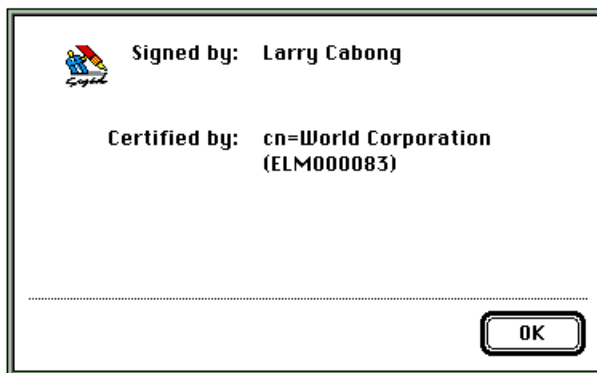
If you click the 'Verify Template' button, Informed Filler verifies your current template and displays the name of the person who authorized it. You can also verify your template by choosing **Verify Template** from the Signatures submenu under Edit. See "Verifying Templates" earlier in this chapter for more information.

When a completed form is signed with Informed Filler, information about the version of the template being used and the person who authorized it is included with the signature. To view this information, click the 'More Info...' button. The Template Authorization dialog box appears.

```
┌──────────────────────────────────────────────────────┐
│ ≡≡≡≡≡≡≡≡≡≡≡ Template Authorization ≡≡≡≡≡≡≡≡≡≡≡     │
│                                                        │
│  ┌──┐  The template that you are currently using might be different │
│  │▫▫│  from the one that was used when the data was originally signed. │
│  └──┘  The template ID and revision number of your template are :    │
│                                                        │
│        Current template ID :   1367850275              │
│           Revision number :   1                        │
│                                                        │
│        The template ID and revision number of the template used when │
│        the data was originally signed are :            │
│                                                        │
│        Original template ID :  1367850275              │
│           Revision number :   1                        │
│                                                        │
│        Click here to identify who authorized the template used when │
│        the data was signed.                            │
│                                                        │
│          ┌────────────────────────────────────┐       │
│          │    Identify Original Authorizer     │       │
│          └────────────────────────────────────┘       │
│       ─────────────────────────────────────────────── │
│                              ┌──────────────────┐      │
│                              │       OK         │      │
│                              └──────────────────┘      │
└──────────────────────────────────────────────────────┘
```

The Template Authorization dialog box allows you to compare both the template ID and the revision number of the template you are currently using with those of the template that was used when the data was originally signed (which may be different). You can see the name of the person who authorized the template that was used when the completed form was signed by clicking the 'Identify Original Authorizer' button.

Having access to the names of the people who authorized both templates is helpful if there is any discrepancy between the two templates. Using this information, you can quickly tell if either one of the templates was authorized by a person without proper authority.

If the 'Display template authorization when verifying data' preference is turned off, only the identity of the data signature (that is, the dialog box that appears when you click 'Identify Data Signer' on the Verify Signature dialog box) is displayed when you verify a signature. To change your preference setting, choose **Preferences...** from the Edit menu and click the Security icon to display the Security preferences panel.
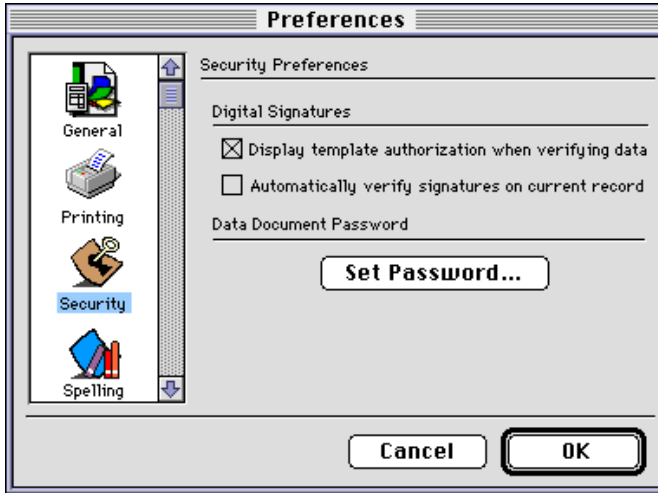
Change the setting then click 'OK.' To cancel the Preferences command instead, click 'Cancel.'

For information about verifying multiple digital signatures at the same time, please see "Working with Multiple Records" later in this chapter.

The Signature Icon

The signature icon is a standard icon that applications use to indicate the presence of a digital signature. With Informed Filler, the name of the signer, and optionally, the date that the form was signed, appears to the right of the signature icon.

The state of a digital signature can be determined only by verifying the signature (see "Signing Forms and Verifying Digital Signatures"). For most signing services, the signature icon is a visual indicator of the signature's validity.

When you view a signed record, the signature icon will contain a question mark. This indicates that the validity of the signature is unknown. If the signature is successfully verified, you'll see a checkmark inside the signature icon. An invalid signature will display an "x" in the signature icon.
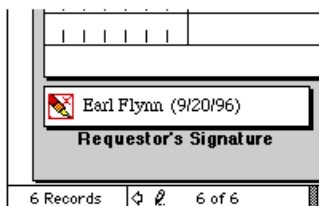
Note	Each time you view a signed record, the signature icon contains a question mark (even if you've recently verified the signature). For example, if you verify the signature on record number 6 in your data document, the signature icon displays a checkmark. If you move to another record in the data document and then return to record 6, the signature icon will again contain a question mark. This is because, while difficult, it's possible that the data could be tampered with between the time the signature was verified and the time you viewed the record again.

In order to sign forms and verify digital signatures, you must have the signing service and the appropriate Informed signing plug-in installed on your computer. If either of these are missing, you can still open forms that contain signature cells. However, rather than seeing the standard signing service-specific signature icon, a generic signature icon will appear instead.

Automatic Verification

Rather than manually verifying each digital signature as you find or browse through different records, Informed Filler can automate the verification process for you. With the 'Verify signatures on current record' preference selected, Informed Filler will automatically verify all digital signatures on the form each time the current record changes (that is, whenever you display a different record in the form window).

To activate the auto-verification preference, choose **Preferences...** from the Edit menu and click the Security icon to display the Security preferences panel. Select the 'Verify signatures on current record' checkbox.
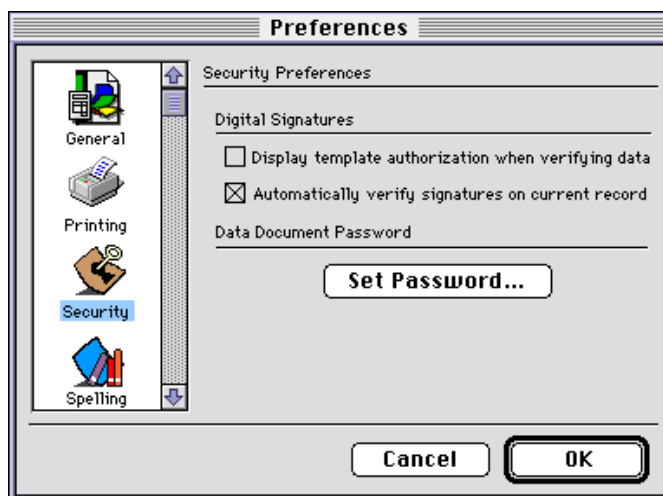
If Informed Filler detects an invalid signature during automatic verification, a message will appear indicating so.

At least one signature on the current record is invalid.

OK
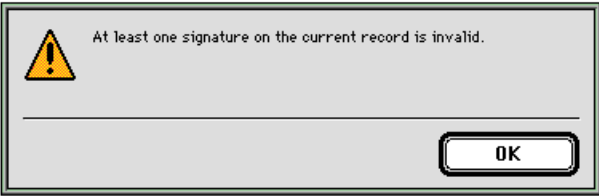
Since verifying a digital signature can take several seconds or more, you may want to use the auto-verification preference only if the computer you're using is fast enough.

Working with Multiple Records

To work with more than one record, Informed Filler provides the Record List window. As explained in Chapter 8, "Manipulating Records," the Record List window displays records in a list, making it easy to see the information of multiple records at a glance. The Record List window also makes it easy to sign multiple records or verify multiple digital signatures at the same time.

Like any cell, a signature cell can appear as a column on the Record List. For each record displayed, the name of the person who signed the record is shown in the signature cell's column.

Recipient	B	Line Total	Approving Signature
Warren Peace		525.00	Justin Tyme
Will DeBeest		555.00	Hiram Firem
Mary Ann Hancock		325.00	Hiram Firem
Sharon Robertson		298.00	Justin Tyme
Marty Gras		100.00	Hiram Firem

5 Records   0 Selected

If you need to sign more than one record, rather than signing each one individually, you can sign them all at once using the Record List. With the Record List containing the records that you want to sign, select the signature cell column and choose **Sign...** from the Signatures submenu under Edit. As always, you'll be asked to identify yourself in a manner according to the signing service you're using. Informed Filler will then sign all records in the Record List.

You can verify multiple digital signatures in the same way. With a signature cell column selected on the Record List window, choose **Verify...** from the Signatures submenu. Informed Filler will verify the digital signatures for all signed records on the Record List. After all signatures have been verified, you'll see a message indicating the results.

> ⚠️ 28 of the 32 records on the Record List are signed. At least one
> signature is invalid. Records with invalid signatures will be
> selected on the Record List.
>
> [OK]

If one or more digital signatures are found to be invalid, Informed Filler will identify the corresponding records by selecting them on the Record List window. An exclamation mark will appear to the left of any invalid signatures on the Record List.

Logging Off Your Signing Service

When you sign a form or verify a signature, Informed Filler may request that you identify yourself. For some signing services, once you've identified yourself, or logged on, the first time after launching Informed Filler, you'll remain logged on until you quit Informed Filler. This allows you to sign forms and verify signatures without having to identify yourself each time.

Care should be taken to never leave your computer unattended once you've logged on to your signing service. Otherwise a different person could use your computer to falsely sign forms using your identity. To explicitly disconnect, or log off, from your signing service, choose the **Log Off Service** command from Informed Filler's Edit menu. After doing so, the next time you sign a form or verify a signature, you may be asked again to identify yourself.

5 Attachments

In this chapter:

5 Attachments

Forms are often associated with other information. For example, an engineering change request form may pertain to a set of engineering design documents. Likewise, many expense forms have associated receipts for the expenses claimed.

With paper forms, associated documents or information are often attached to a form using a paper clip. Informed Filler provides this same capability by allowing you to attach electronic documents to electronic forms. Any file, regardless of its size or content, can be attached to a record. Although not visible on the form itself, an attached file becomes part of a record just like the information in each of the cells and is stored with the record in the data document. If you mail a record to another person, the attached files, if any, are included. The recipient can extract the files so that they can be accessed or viewed using the appropriate application.

This chapter explains how you can attach files to records. The Attachments window is described as well as the Attach and Extract commands.

The Attachments Window

Just above the scroll bar along the right edge of the form window is a paper clip with a number below it. The number indicates the number of files that are attached to the current record. Files that are attached to a record are not visible on the form itself. Instead, attached files can be seen in the Attachments window.
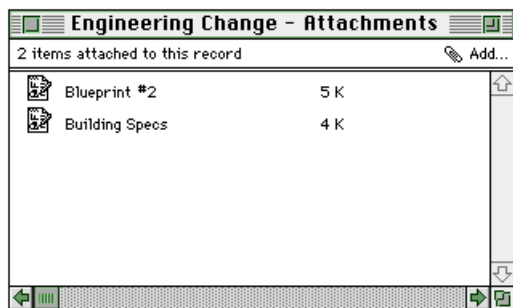
To show the Attachments window, choose **Show Attachments** from the View menu, or click the paper clip indicator on the form window. To close the Attachments window, choose **Hide Attachments** from the View menu, or click the window's close box.

The Attachments window is like any window; it can be resized and repositioned on the screen the normal way. Each attached file, along with its size, is listed in the Attachments window.

Windows and Mac OS File Types

Since Windows and Mac OS are two different operating systems, it is normal to expect differences in the way that files are stored with each one. Although these details are not important to the typical computer user, it is useful to understand certain differences as they relate to Informed Filler's attachments feature.

The type of a file determines the type of information that is contained in the file. On Windows, a file's type is specified by the three character DOS extension in the file's name. For example a text file has the extension ".TXT."

On the Mac OS, a file's type is stored separately from its name and is usually reflected in the appearance of its icon. Each file's type is represented as a four character code that is maintained by the Mac OS. This code is normally not visible to the user. A text file on the Mac OS has a file type of "TEXT."

If you attach a file to a record on one platform (Windows or Mac OS), and then mail the record to a user of the other platform (Mac OS or Windows), Informed Filler has to know which file type to use when the file is extracted. For example, if a Windows user attaches a text file (that is, a file with the ".TXT" DOS extension) to a record, when a Mac OS user extracts the file, Informed Filler must know to use the "TEXT" file type.

Whenever a file is attached or extracted on the Mac OS, Informed Filler looks up the file's type or extension to find the corresponding extension or type. If a Windows file is being extracted, the file's DOS extension is looked up to find the corresponding Mac OS file type. If a Mac OS file is being attached, the corresponding DOS extension is looked up and stored so that it can be used later if a Windows user extracts the file.

A list including many of the common DOS extensions and Mac OS file types is built into Informed Filler. In addition to this list, the Mac OS user can add others using the PC Exchange control panel.

The information available in PC Exchange is utilized only if entries are found for the text file type and Informed's data document type. The table below shows the settings you should use.

DOS Extension	Associated Application	Mac OS File Type
.TXT	SimpleText	Text document (TEXT)
.IFM	Informed Filler™	Form data document (IDoc)

For detailed information about PC Exchange, please see your Macintosh *Getting Started Guide*.

Attaching Files

There are two ways to attach files to a record. You can drag files onto the paper clip or the Attachments window, or you can use the Attach command.

To attach a file by dragging, click on the file's icon, and hold the mouse button down. Drag the file onto the paper clip or the Attachments window until a highlighted frame appears, then release the mouse button. To drag and attach multiple files at once, select them all, then drag the them onto the paper clip or Attachments window.

Alternatively, you can use Informed Filler's Attach command to attach a file.

To use the Attach command, choose **Attach...** from the File menu or click 'Add...' on the Attachments window. A dialog box appears allowing you to select a file to attach.

If your computer uses Windows, you'll see this dialog box:
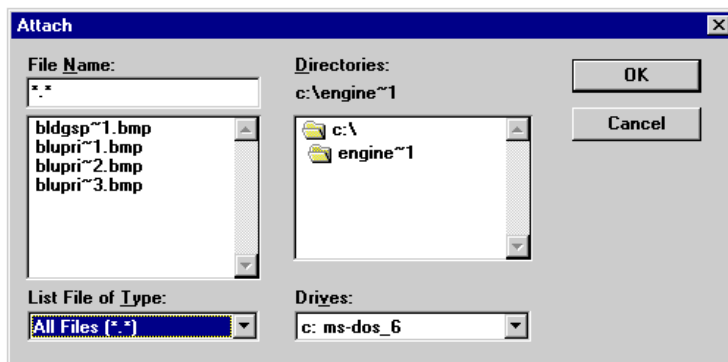
To select a file to attach, click it in the 'File Name' scrolling list, then click 'OK.' To change your selection, simply click a different file. To cancel the Attachment command and dismiss the dialog box, click 'Cancel.'

If you're using a Mac OS, you'll see one of two dialog boxes when you choose the Attach command. If your computer has System 7.0 or later, you'll see a dialog box that allows you to select more than one file to attach.
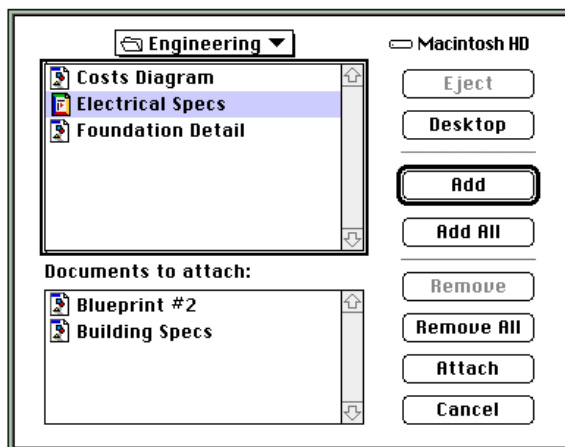
To select a file to attach, click it in the upper scrolling list and click 'Add,' or simply double-click the file. The name of the selected file appears in the lower scrolling list. To add all the files in the current folder, click 'Add All.' To remove an item from the list of those to attach, click the file in the lower scrolling list and click 'Remove,' or simply double-click the file. To remove all the files that you've selected, click 'Remove All.' Once you've made your selection, click 'Attach' to attach the files or click 'Cancel' to cancel the Attachments command and dismiss the dialog.

If your computer has system software earlier than version 7.0, the Attach dialog box that you'll see only allows you to select and attach one file at a time.

Extracting Files

When a file is attached to a record, the file's content is stored along with the record's data in the data document. Before you can access an attached file, you must extract the file. Extracting a file places a copy of the file at a location that you specify on your hard drive.

Like attaching files, there are two different methods with which you can extract files. If you're using a computer with System 7.5 or later, you can simply drag an attached file from the Attachments window to a place on your hard drive. You can select and drag more than one item at the same time. If an item with the same name as the file you are extracting already exists at the location you drag to, you'll be asked if you'd like to replace the file or cancel the action.

The Extract command provides an alternate method of extracting a file. This is the only method available if your computer uses Windows, or a version of the Mac OS earlier than 7.5. To extract a file using this method, select the file in the Attachments window and choose **Extract...** from the File menu. As a shortcut to the Extract command, you can double-click the item in the Attachments window.

If your computer uses Windows, you'll see this dialog box:
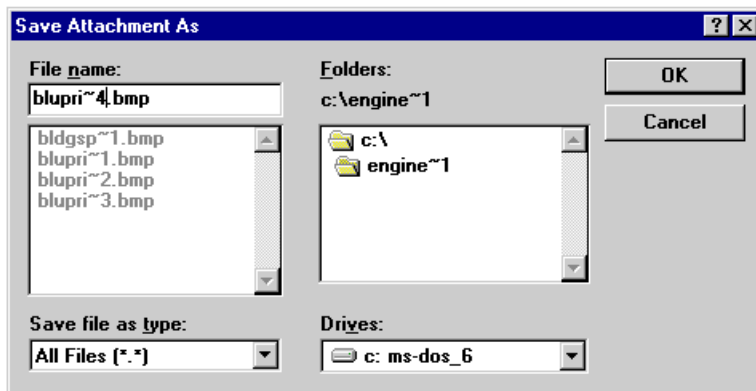
Select the location that you want to save the attached file and click 'OK.' To cancel the Extract command and dismiss the dialog, click 'Cancel.'

If you're using the Mac OS, you'll see the standard Save dialog box.
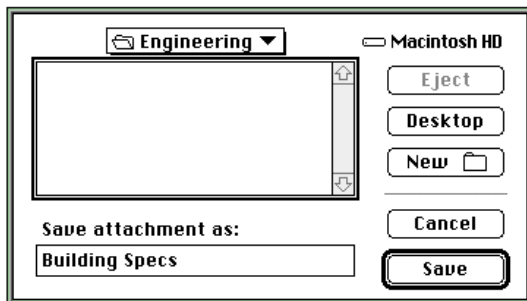
Select the folder that you want to save the attached file into and click 'Save.' To cancel the Extract command and dismiss the dialog, click 'Cancel.'

If a file with the same name as a file being extracted already exists at the location you specify, you'll be warned and asked if you would like to replace the existing file or cancel the Extract command.

You can extract multiple files at once by first selecting each of them in the Attachments window before choosing the Extract command. For each of the selected files, you'll see either of the dialog boxes shown above allowing you to specify the name and location of each file separately.

Deleting Attachments

To delete an attachment, click it in the Attachments window, then choose **Clear** under the Edit menu, or press the Delete key.

If you're running a Mac OS computer with System 7.5 or later installed, you can also delete an attachment by selecting it in the Attachments window and dragging it to the Trash.

Attachments and Digital Signatures

The designer of the templates you use can include signature cells for signing purposes. Chapter 4, "Using Digital Signatures," explains how you can sign records and verify digital signatures.

A signature cell can sign all cells on a form or only certain cells. Furthermore, the form designer can configure a signature cell to sign attachments in addition to information in cells. A signature that signs attachments includes the contents of any attached files with the data in cells that are signed when you sign a record. That way the integrity of attached files can also be protected.

Informed Filler allows you to see which cells are signed and whether or not attachments are signed by a particular signature cell. As explained in Chapter 4, you can select the Show Signed Cells command from the Signatures submenu under Informed Filler's Edit menu to see this information. Informed Filler frames each cell that is signed by the selected signature cell with a red box.

If the selected signature cell does not contain an actual signature and the cell is configured to sign attachments, you'll see a red frame around the Attachments window. This is to indicate that if you sign the record in that signature cell, all of the currently attached files will be signed as well. If the selected signature cell does contain a signature and the cell is configured to sign attachments, you'll see a red frame around only those attached files that were present when the record was signed.

Once a record has been signed with a signature that signs attachments, you can add other attachments without compromising the digital signature. Informed Filler knows which attachments a signature has signed and prevents you from deleting them.

5-8 : Attachments

6 Spell Checking

In this chapter:

6 Spell Checking

This chapter describes Informed Filler's spell checking feature. You can ensure the accuracy of the data entered in text and name cells by checking for spelling mistakes on all pages of a form or only on particular sections.

Informed Filler relies on the spell checking services available via Informed spell checking plug-ins. Because Informed was developed with an "open" architecture, Shana can easily support new spell checking services by developing new plug-ins. For spell checking to be available, you must have the spelling plug-in installed in your plug-ins folder, and the spelling dictionaries installed in your Informed folder.

Informed Filler comes with a built-in spell checker and the spell checking plug-in needed to use it. These items are automatically installed when you install Informed Filler.

Spelling Preferences

By setting Informed Filler's spelling preferences, you can specify certain criteria used when spell checking is performed on your form. For example, you can choose which language dictionary to use, and also select various language options.

To set Informed Filler's spelling preferences, choose **Preferences...** from the Edit menu, then click the Spelling icon in the scrolling list. The Preferences dialog box changes to show the Spelling Preferences panel.
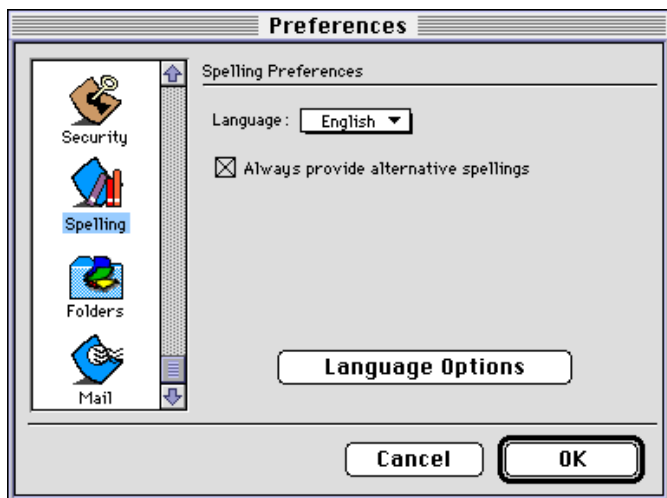
The language dictionaries that are built into Informed Filler allow you to check spelling in several different languages. To select a dictionary, click the 'Language' drop-down list and make a selection from the available choices.

By default, Informed Filler provides alternative spellings for questionable words when you perform spell checking. If you don't want to see alternative spellings, turn off the 'Always provide alternative spellings' checkbox.

You can set various options for each of the dictionaries by clicking the 'Language Options' button. The Language Options dialog box appears. Depending on which language you've chosen, the dialog box will display different options. The following illustration shows the options available for the English dictionary.

To set your options, click the appropriate radio buttons or checkboxes, then click 'OK.'

Note   The options you select on the Language Options dialog box do not take effect until you click the 'OK' button on the Spelling Preferences panel.

If you move your Informed folder or change the location of the Spelling folder, Informed Filler will not be able to find the spelling dictionaries when you attempt to spell check a form. If this happens, the 'Language Options' button on the Preferences dialog box changes to 'Set Up Spelling.' Click this button to select the 'Spelling' folder in its new location.

Spell Checking Your Forms

Informed Filler allows you to check the spelling of data entered in text and name cells. When a spell check is performed, Informed Filler checks both words and names. Any questionable words on your form (that is, words that are not found in the spell checking dictionary you've chosen) are flagged and displayed on the Check Spelling dialog box. The only exceptions to this are display only cells and cells that have been signed with a digital signature. These cells are skipped when spell checking is performed.

You specify which information will be checked by your choice of command from the Spelling submenu under Edit. You can spell check the current record, the collected records, or a particular selection on the form.

To check the current record or the collected records, choose **Check Current Record...** or **Check Collected Records...** respectively. To spell check a particular selection, first select a cell value, then choose **Check Selection...**. After choosing one of the submenu items, the Check Spelling dialog box appears.
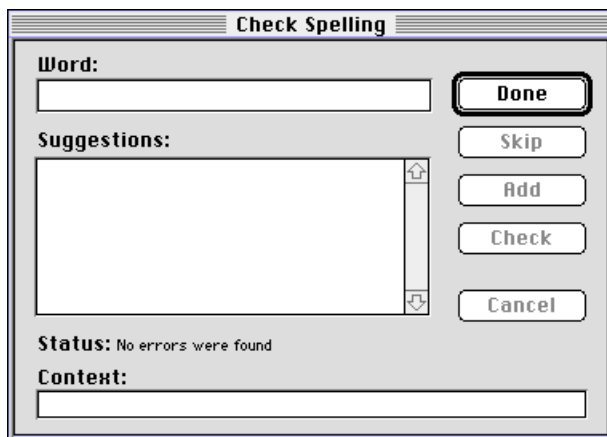
When checking the current record, Informed Filler begins checking the entire form, page by page. When checking the collected records, Informed Filler checks each page on a record before moving to the next record. If no questionable words are found, the text boxes and scrolling list on the Check Spelling dialog box are blank, and only the 'Done' button is available. Click 'Done' to return to the record.

If a questionable word is found, Informed Filler flags it and displays it in the 'Word' text box. If the 'Always provide alternative spellings' preference is turned on, Informed Filler will display a list of possible replacement words in the 'Suggestions' scrolling list. Below the list of suggestions is a status line that describes the type of questionable word. Informed Filler's spell checker will detect

misspelled words, double words, and other questionable occurrences. The 'Context' box at the bottom of the dialog displays the questionable word in context. That is, if the word is part of a sentence, the full sentence is shown. If the word is a single word, it is displayed by itself.
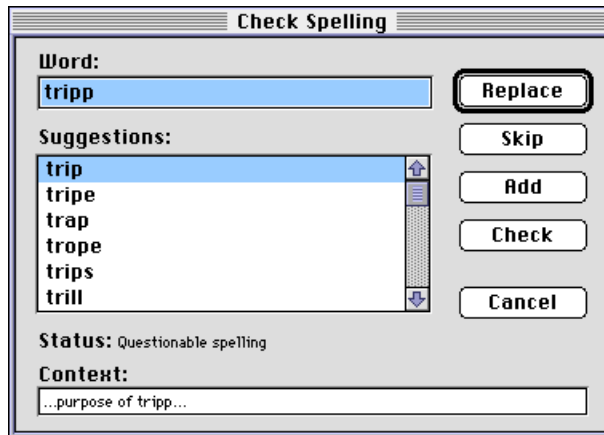
When a questionable word is found, you can replace it with a word from the 'Suggestions' scrolling list, you can skip the word, you can add the word to the dictionary, or you can type a different word in the 'Word' text box.

To replace a questionable word with one of the alternative spellings, select the alternative in the 'Suggestions' scrolling list, then click 'Replace' or simply double-click the alternative word in the list. Informed Filler replaces the word and continues checking the form.

You can skip a questionable word by clicking the 'Skip' button. Clicking 'Skip' passes over the word during the current spell check. The next time you spell check the form (without changing the questionable word), Informed Filler will flag and display the word again.

To add a word to the dictionary, click the 'Add' button. This feature can be very helpful if you have an uncommon name or an unusual spelling that you enter into a name or text cell. For example, the last name "Brachi" is not very common and is not recognized in Informed Filler's English dictionary. Normally, the word "Brachi" would be questioned when you spell check the form. By adding the word to the dictionary, Informed Filler accepts it as a valid word.

As mentioned previously, when a questionable word is found, Informed Filler provides a list of alternative spellings in the 'Suggestions' scrolling list. If the word you are looking for is not in the list, you can check the dictionary for other alternatives. For example, if the word "surreal" was misspelled as "cureal," the scrolling list might show the following alternatives: cruel, cure-all, and churl. Since neither of these are the correct word, you can try to find other alternatives by changing the spelling in the 'Word' text box and clicking the 'Check' button. If you change the spelling to "sureal" and click 'Check,' the 'Suggestions' scrolling list will show the correct spelling of "surreal" as an alternative.
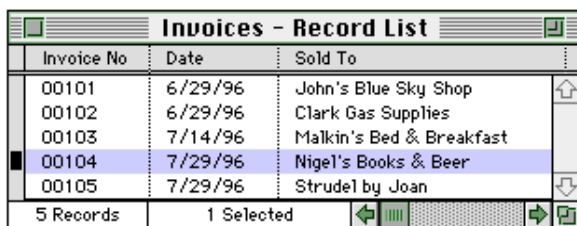
When spell checking is completed, and you've dealt with any questionable words, the Check Spelling dialog changes to show the 'Done' button. Click 'Done' to return to the form window.

It's possible that changing the value in a cell by spell checking can cause an error based on the cell's check formula. If this occurs, Informed Filler will stop the spell checking operation and return you to the form window. The cell with the invalid value will be selected and an error message might be displayed (depending on the cell's check formula).

If the invalid value causes an error to occur in another cell on the form (such as a calculated cell), Informed Filler will alert you when spell checking is finished or, in the case of checking multiple records, when moving to the next record.

Spell Checking From the Record List

As explained in Chapter 8, "Manipulating Records," the Record List window displays records in a list, making it easy to see the information for multiple records at a glance. You can also perform spell checking on records displayed in the Record List.

With the Record List in front, you can specify which records you want to spell check by selecting one or more records in the list, and choosing an item from the Spelling submenu under Edit.

With the exception of the Check Selection command, the spell checking commands perform the same as when you spell check from the form window. Choosing **Check Current Record...** checks the current record and choosing **Check Collected Records...** checks all records in the collection. The current record is identified by a black rectangle in the left margin of the Record List window.

When you choose the Check Selection command with the Record List displayed, you are not spell checking a selection of text, but rather a selection of records. To do this, select one or more records on the Record List, then choose **Check Selection...** from the Spelling submenu.

After you choose one of the spell checking commands, the Check Spelling dialog box appears, and Informed Filler begins checking the requested records. If Informed Filler is checking the collected records or a selection of records, you'll see the current record indicator moving down the Record List as each record is checked in succession.

When spell checking is completed, and you've dealt with any questionable words, the Check Spelling dialog box changes to show the 'Done' button. Click 'Done' to return to the Record List window.

7 Annotation

In this chapter:

7 Annotation

In addition to the information that you enter in each cell on a form, you can also include annotated notes or comments using Informed Filler's annotation features. An annotated note is usually a comment of some sort that's intended to bring something important to the reader's attention. For example, you might attach a note to an invoice to instruct the shipper to hold the order until the customer's account is paid.

Traditionally, notes have been hand written either directly on the paper form, or on small pieces of yellow paper—sometimes called 'yellow stickies'—and then stuck on the form.

Informed Filler uses the 'yellow sticky' analogy to show annotated notes. You can place and position notes on any form. You can enter a textual note, or if you're using a Mac OS compatible computer, you can record a voice message. A note appears on your screen much like a small piece of yellow paper appears attached to a paper form.

The familiar appearance of a note is intended to make clear the distinction between a note and the information on the form itself. An annotated note should contain auxiliary information that's asso-

ciated with the form to which it's attached. For example, unlike the order date on a purchase order form (which appears on every purchase order form), a comment such as 'Please get approval from Jane before submitting this purchase order.' applies specifically to one particular form only.

The remaining sections of this chapter describe the annotation features of Informed Filler. You'll learn how to place and position notes, and how to record and playback messages. You'll also learn how notes are affected when the design of a form is changed by the Informed Designer user. For information about importing and exporting notes, see Chapter 13, "Exchanging information."

Placing, Moving, and Removing Notes

Informed Filler allows you to place and position as many notes as you like. To place a new note, first find the record that you want to annotate and bring the form window to the front. Then choose **Place Note** from the Edit menu. A blank note appears centered in the form window.

Each note contains controls for entering, changing, and playing back messages. For instructions on using these controls, please see "Typing, Recording, and Playing Back Notes" later in this chapter.

You can move a note to any position on your form by simply clicking and dragging it with the mouse. You should always position a note next to the information to which it specifically applies. For example, if you enter a note as a reminder that a customer's telephone number has changed, you should position the note next to the new number. Once you've created a note, it will automatically appear whenever you see the record in the form window.

To remove an existing note, first click it with the mouse. The note will appear black to indicate that it's selected. Then choose **Clear** from the Edit menu, or press the Delete (or Backspace) key.

By using the Cut and Paste Clipboard commands, you can move a note from one page or document to another. To transfer a note to the Clipboard, select it and choose **Cut** from the Edit menu. Informed Filler will remove the note from the form and place it on the Clipboard. Then, after changing pages, choose **Paste** from the Edit menu to transfer the note from the Clipboard back onto the different page of your form.

Typing, Recording, and Playing Back Notes

Depending on which operating system you're running Informed Filler on, different controls on notes will be available. Windows supports text notes, so only the control for viewing and editing text notes will be available. If you're using a Mac OS compatible computer, you can use controls for recording and playing back voice notes in addition to the text note control.

Windows note   Mac OS note

First words of
a text note

Text note control

Text note control   Playback control   Recording control
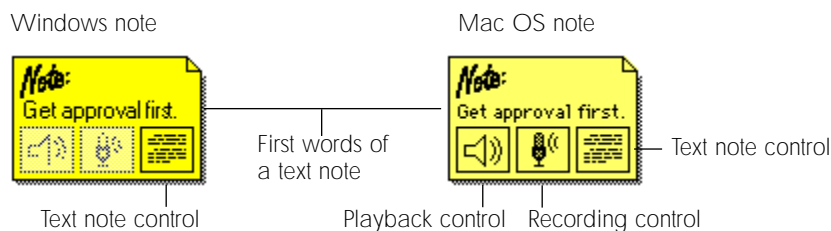
Textual Messages

Informed Filler displays the first few words of a textual note on the note itself. If the entire note doesn't fit in the space provided, you'll see only the first few words followed by an ellipsis ('...').

To enter, view, or change the text of a note, click the note's Text control. The Note dialog box appears.
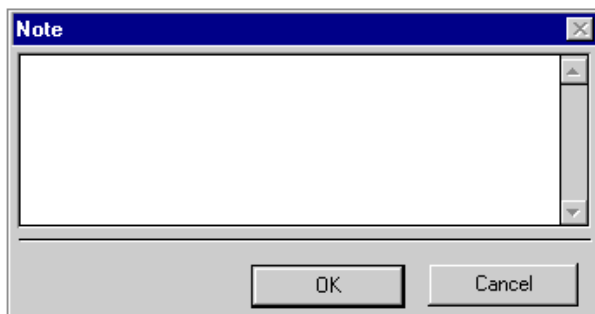
A textual note can be as long as you like. If you type past the end of a line, or if you press the Enter (Windows) or Return (Mac OS) key, Informed Filler will start a new line for you. If you enter more lines than the text box can display, you can use the scroll bar to scroll the text up or down.

To dismiss the Note dialog box, click 'OK.' To cancel the changes you've made, click 'Cancel' instead.

Voice messages

If you're using a Mac OS compatible computer, you can also record a voice message. Recording a voice message is much like leaving a message on a telephone answering machine. You simply speak into a microphone and Informed Filler records your message. A voice annotated note can later be played by clicking the Playback control on the note itself.

In order to use the voice annotation capabilities of Informed Filler, you must have a microphone attached to your computer before you can record a message. If you don't have the required hardware and software, the Playback and Recording controls on the note will be unavailable.

To record a voice message, click the note's Recording control. The standard sound-input dialog box appears.
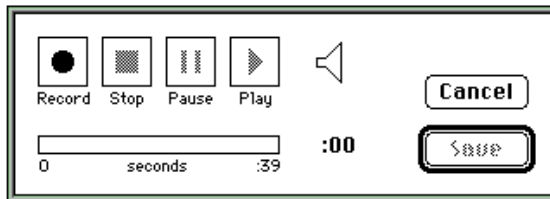
To begin recording, click 'Record.' As you speak, the message length is displayed on the sound-input dialog box. When you've finished recording, click 'Save.' The recorded message is saved with the note.

You can listen to a recorded voice message by clicking the Playback control on the note. To change the message, simply record over the old message by following the instructions described above.

How Design Changes Can Affect Notes

It's quite common for the design of a form to be revised and updated from time to time by the form designer. Certain design changes can affect the data that's already stored in a data document (deleting a cell, for example). Other changes can affect notes that have been placed on the forms. For example, if a note is placed next to the right edge of a form, and the form designer reduces the form's width, the note will automatically slide back onto the page when the form is next opened with Informed Filler.

Notes are affected when a form template is changed in the following ways:

◻ reduce the size of the form
◻ remove a page from the form

If the Informed Designer user removes a page of a form template that contains notes, the notes themselves will be moved onto the work page the next time the data document is opened with Informed Filler. You can then move the note from the work page back to a numbered page. For information on how to move notes between pages, see "Placing, Moving, and Removing Notes" earlier in this chapter. For an explanation of the work page, see "The Work Page" in Chapter 3.

8 Manipulating Records

In this chapter:

8 Manipulating Records

Informed Filler allows you to store and manipulate completed forms using its built-in database. You can enter new forms or change existing forms. You can find, duplicate, remove, print, sort, and total forms as well.

Chapter 3 explains how to fill out a form. In this chapter you'll learn more about storing and retrieving completed forms or *records*. To enter, find, change, duplicate, and remove records, you'll use commands that are found in the Database menu.

You'll also learn about the Record List, a powerful tool for listing and manipulating multiple records. The List menu contains commands that let you to set up and customize the Record List to suit your own personal preferences. For information about printing forms, please see Chapter 9.

Collection of Records

As explained in Chapter 1, "Overview" (see "Filling Out Forms"), the information that you enter to fill out forms is stored in form data documents. Each form data document contains a database that can store the information for one or more completed forms. The set of information (such as name, address, phone number) that you enter to complete a single form is called a record.

The record that you see in the form window is called the *current record*. This is the record that you can edit by typing in each cell.

The current record is always a member of the current *collection* of records. The collection represents a group of records that can consist of one record, all records, or a particular set of records in your data document. By using the Find, Find All, Omit, and Omit Others commands, you can add particular records to, or remove them from the collection. Certain commands like Print and Send allow you to select the current record or those records in the collection. And as you'll learn later in this chapter, the Record List displays a list of the collected records. The figure below illustrates all records, the collected records, and the current record.

Current record
Collection
All records
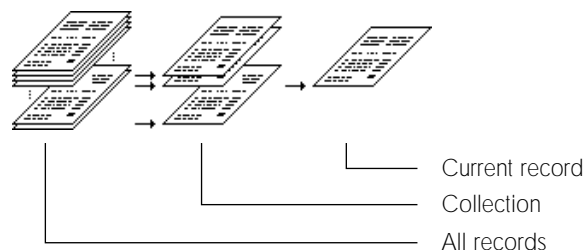
Positioned at the lower left corner of the document window are two information boxes. They show you the number of records in the data document, the number of records in the collection, and which record in the collection is the current record.

Collection information box

Record count information box
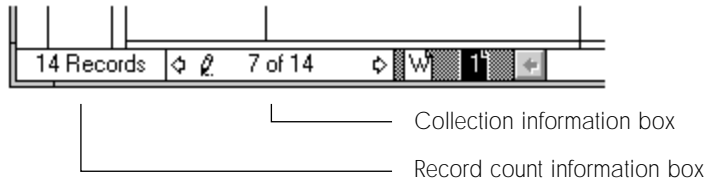
The '7' in the collection information box identifies the current record. It means you're looking at the seventh record in the collection. The '14' indicates the number of records in the collection. You can use the Record List, or the Next, Previous, First, and Last commands to browse through the records in the collection. For more information, see "The Record List" and "Browsing Through Records" later in this chapter.

The Record List

When you open a form data document, the form window automatically appears displaying the contents of the form. In this window, you fill out and edit records. The form window, however, is not always suitable for browsing through different completed forms since you can see only one record at a time.

To work with more than one record, Informed Filler provides the Record List window. The Record List window displays records in a list, making it easy to see the information of multiple records at a glance. The following figure shows a typical Record List window.

The Record List window is a standard window. Informed Filler automatically names it by appending '- Record List' to the name of your data document. You can move the Record List to any position on your screen by clicking and dragging the window's title area. To view a different area of the Record List, click the appropriate scroll bar controls.

To show the Record List, choose **Show Record List** from the Window menu. While the Record List window is the front-most window, this command changes to Hide Record List. Choose **Hide Record List** or click the window's close box to hide the Record List window.

The Record List window can be customized to suit your own personal preferences. You can choose which columns appear on the Record List and in what order they appear. You can sort any column or calculate a column's total or average. You can also save different Record List formats so you can easily switch between your most common formats (see "Saving Record List Formats" for more information). You can even print the Record List to produce summary reports of your records. For information on printing the Record List, see Chapter 9, "Printing Forms."

Contents of the Record List

Information on the Record List is divided into rows and columns. Each row represents one record. Each column corresponds to one cell on the form. You can choose which columns appear on the Record List and their order and alignment (see "Adding and Removing Columns").

The Record List always displays only those records in the collection (see "Collection of Records" earlier in this chapter). As you use commands that affect the collected records, the contents of the Record List will change accordingly. For example, suppose that you use the Find command to find all invoices with a total amount greater than $500. After searching, Informed Filler will replace the contents of the collection—and therefore the Record List as well—with those records found. The information box near the lower left corner of the window indicates how many records are on the Record List.

Although Informed Filler allows you to show picture cells on the Record List, the actual pictures themselves do not appear. Instead, if a picture exists for a particular record, an 'X' will show on the corresponding row on the Record List. Therefore, at a glance you can easily see which records have pictures and which don't.

You can show both field cells and table cells in the Record List window. A field cell has one value, whereas a table cell can have multiple values, one for each row in the table. To indicate that a column represents a table cell, Informed Filler draws a small table icon next to the column heading on the Record List.

Even though a table cell can have more than one value, only the value found on the first row of the table appears on the Record List. In the previous illustration, each row represents one invoice. The values in the Item Number column correspond to the values found on the first rows of the Item Number column on the different completed invoices. To see the remaining rows of the table, view the record in the form window.

The form designer can choose to index a cell so that searching with Informed Filler is faster. (See "Indexed cells" later in this chapter.) For indexed cells that are displayed on the Record List, you'll see a small magnifying glass symbol near the right edge of the column title.

You cannot change which cells are indexed with Informed Filler.

Adding and Removing Columns

Informed Filler allows you to choose which columns appear on the Record List. Initially, the Record List contains columns for up to 10 cells on the form; indexed cells first, then the remaining cells by tab order. You can add or remove columns, and you can change the alignment or width of any column.

You show a column on the Record List by using either of the Add Columns or Add to Record List commands. The Add Columns command lets you pick which columns to add from a list of cell names. To use this command, first show the Record List window, then choose **Add Columns...** from the List menu. The Add Columns dialog box appears.
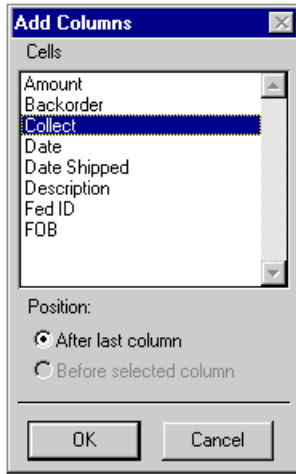
The scrolling list contains the names of all cells on your form. Click to select the cell that you want to add to the Record List. If you want to add more than one column, select each cell while holding down the Control (Windows) or Command (Mac OS) key. Pressing Shift while clicking selects the range of cells starting with the first cell currently selected and ending with the one you click.

You can position the selected cell (or cells) either at the end of the Record List after the last column, or between two existing columns. To position at the end of the Record List, select the 'After last column' option on the Add Columns dialog box. To position between two existing columns, select the column on the Record List immediately following the desired position before you choose the Add Columns command. Then select the 'Before selected column' option. (You select a column by clicking its heading; see "Selecting Records and Columns" for more information.)

Like Add Columns, the Add to Record List command adds a new column to the Record List. However, instead of choosing a cell from a list of cell names, you select a cell on the form window. This command is more convenient if you don't know how the cells on your form have been named.

To use the Add to Record List command, first choose the cell that you want to add by selecting it on the form window, then choose **Add to Record List** from the Cell menu. Informed Filler will add the selected cell to the end of the Record List.

Click to select a cell on the form window…

…then choose Add to Record List.

You can show as many columns on the Record List as you like. You can even show the same column more than once. If the total width of all columns exceeds the width of the Record List window, use the scroll bar along the bottom edge of the window to scroll the columns in either direction.

To remove a column from the Record List, select it by clicking its heading, then choose **Remove Column** from the List menu. The column will no longer appear on the Record List.

Note   Removing a column from the Record List does not remove data from the database of records.

Select the column to remove…

…then choose Remove Column.

The remaining columns on the Record List will automatically move to occupy the original position of the column removed.

Changing a Column's Position

Informed Filler allows you to set the positions of the column's on the Record List. To move a column from one position to another, first remove the column, then add it again using the Add Columns command and the 'Before selected column' option.

As a shortcut, you can click and drag a column's heading to the left or right while holding down the Alt (Windows) or Option (Mac OS) key. When you release the mouse button, the column is placed in the new position.

Click and drag while holding down the Alt/Option key…

…the column moves to a new position when you release the mouse button.

Changing a Column's Width

When you add a new column to the Record List, Informed Filler automatically sets its width to approximately one inch. You can change the width of any column by dragging the right edge of its heading.

Click and drag
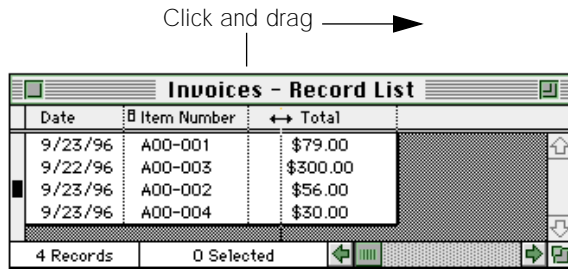
When you drag a column divider, only the size of the column on the left changes. The columns on the right, if any, move with the position of the column divider. If you hold the Control (Windows) or Command (Mac OS) key down while dragging a column divider, instead of moving the columns on the right, Informed Filler will change the widths of both adjacent columns.

Changing a Column's Title

You can change the title of any column on the Record List from its original cell name to any custom name you like.

To change a column's title, first select the column on the Record List by clicking its heading, then choose **Column Title...** from the List menu. The Column Title dialog box appears:
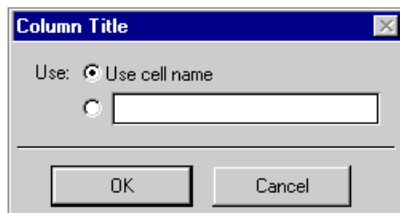
To change the name, simply type in the new name.
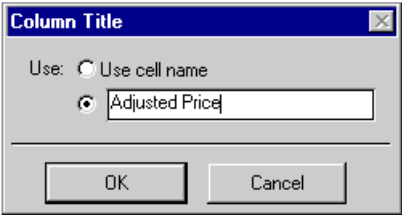
When you have entered the name, click 'OK.' The new name replaces the cell name on the Record List. If you want to revert and use the cell name, click the 'cell name' radio button, then click 'OK.'

Changing a Column's Alignment

You can change the alignment of each column on the Record List to improve the readability of the records. For example, it's common to align the right sides of numbers in a column so that the decimal points line up. Or maybe you want to center a column of dates. Each column on the Record List can be left, center, or right aligned.

To change a column's alignment, select the column by clicking its heading, then choose a setting from the Alignment submenu under List. To change the alignment of multiple columns, select them all at the same time before choosing the new setting.

Selecting Records and Columns

You can select information on the Record List by clicking rows or columns. Many of the commands described later in this chapter can apply to information that is selected on the Record List. For example, you can remove a record by selecting it on the Record List, then choosing **Remove** from the Database menu. Or you can sort a column by selecting it and choosing **Sort...**.

Clicking a row selects the corresponding record, whereas clicking a column's heading selects the entire column. You can't select a row and a column at the same time.

When you click to select a row or column, Informed Filler will automatically deselect all others that are currently selected. Pressing the Control (Windows)/Command (Mac OS) or Shift keys while clicking allows you to select more than one row or column at the same time. You could, for example, select five records and then print them using the Print command. If you hold down the Control/ Command key, Informed Filler will select the corresponding row or column in addition to those currently selected. If you press the Shift key instead, all columns or rows between the first one currently selected and the one clicked on (inclusive) are selected.

Note   The small rectangular region to the left of the column headings on the Record List window has a special purpose. As a shortcut, clicking it deselects all rows and columns on the Record List.
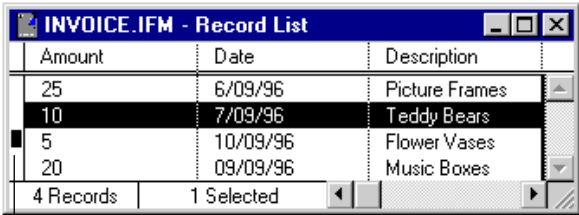
You can also use the Select All command under the Edit menu to select all records on the Record List.

As you select and deselect records on the Record List, the rightmost information box along the bottom edge of the window changes to display the current number of selected records.

The Current Record Indicator

As defined earlier in this chapter (see "Collection of Records"), the current record is the one that appears in the form window. When you browse through the collected records using commands such as Next, Previous, First, and Last, the current record changes to reveal each different record in the form window.

On the Record List window, the current record is identified by a small rectangular icon along the window's left edge.
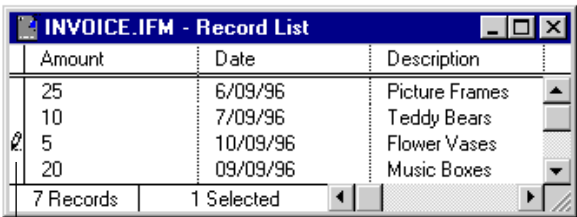
└─ Current record indicator

With the Record List window active, you can change the current record by clicking in the current record indicator area next to the desired record. You can also change the current record by double-clicking a different row on the Record List. However, in addition to changing the current record, double-clicking will also bring the form window to the front.

While you edit the current record on the form window, if that record is visible on the Record List, Informed Filler shows a pencil icon in place of the current record indicator.

└─ Pencil indicates that the current record is being edited.

As you change the record by typing in each cell, the corresponding columns on the Record List are not updated. Informed Filler updates the contents of the Record List only when you accept the record by pressing Enter.

Totalling or Averaging a Column

Informed Filler can calculate the total or average of any column on the Record List. This feature is useful for summarizing the information in a collected set of records. For example, after finding all overdue invoices, you could total the amount due column to obtain the total amount overdue.

The Totals command lets you turn totalling or averaging on or off for each of the selected columns on the Record List. Select the desired column or columns, then choose **Totals...** from the List menu.
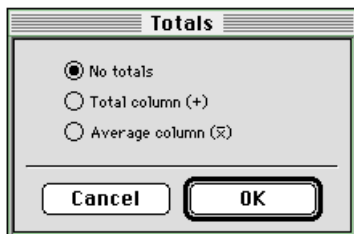
The Totals dialog box shows the current setting of the selected columns (totalled, averaged, or no totals). If you've selected two or more columns that are configured differently, the Totals dialog box will show no setting. Choose a setting then click 'OK.' Informed Filler will calculate the results and display them below the last record on the Record List. Each value appears bold and aligned according to the column's alignment.

To indicate that a column is totalled or averaged, Informed Filler draws a small symbol to the right of the column's heading. Totalled columns have a plus sign, whereas averaged columns have an 'X' with a bar over it (the statistical symbol for *average*).

While totals are calculated, progress information is displayed on the totals line itself. The amount of time required to calculate the results depends on the number of records on the Record List. Note though, that Informed Filler lets you do other work at the same time. You could, for example, edit a record while a column is totalled.

Although you can total or average any column on the Record List, the resulting value will be informative only if the column contains numeric, boolean, or checkbox values. If a column represents a non-number cell, Informed Filler will attempt to convert each cell value to a numeric equivalent as the total or average is calculated. The resulting total will be the sum of those values that look like numbers.

For boolean values and checkboxes, the values Yes, True, On, and a checked checkbox become 1, whereas the values No, False, Off, and an unchecked checkbox become 0. Therefore, you can count the number of Yes, On, True, or checked check box values in a column by totalling the column.

Note   When you total or average a column that represents a table cell (for example, the quantity sold cell on tabular invoice), the resulting total or average is calculated based on all values on all rows of the records on the Record List. It's therefore possible, and often likely, that a total or average won't match the values above it on the Record List. This is because the Record List shows only those values found on the first row of each record on the Record List. See "Contents of the Record List" earlier in this chapter for more information.

Showing and Hiding the Totals Line

When you total or average a column, Informed Filler automatically shows the totals line on the Record List. If you want, you can manually show and hide the totals line using the Show/Hide Totals command under the List menu. You might, for example, want to temporarily hide the totals when you print the Record List.

Saving Record List Formats

As described earlier, you can customize the Record List by choosing which columns appear in it and what position they occupy. You can also change the names and widths of columns, and calculate totals or averages for any column. The configuration of columns that you specify is called a Record List format. These formats are useful if you need to print different summary reports from the Record List. Rather than configuring a special format each time you want to display the Record List in a particular way, Informed Filler allows you to save your custom formats so that you can instantly switch the Record List to the format you want.

After configuring the Record List, you can save your format by choosing **Save Format...** from the Formats submenu under the List menu. The Save Current Format dialog box appears.
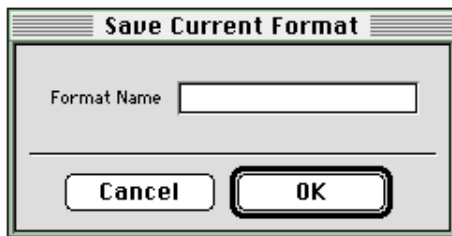
Enter the name of your Record List format in the text box and click 'OK.' Informed Filler saves the current Record List format and displays the format name in the Formats submenu.

Names of Record List formats
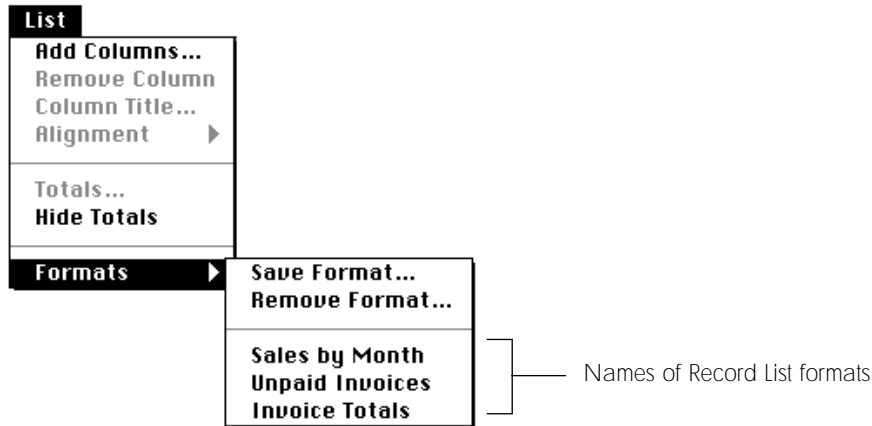
To switch from one format to another, simply choose the format name from the Formats submenu and Informed Filler will display the Record List in the appropriate format.

Removing a Record List Format

If you no longer require a Record List format, you can remove it from the Formats submenu by using the Remove Format command.

To remove one or more Record List formats, choose **Remove Format...** from the Formats submenu. The Remove Saved Format dialog box appears.
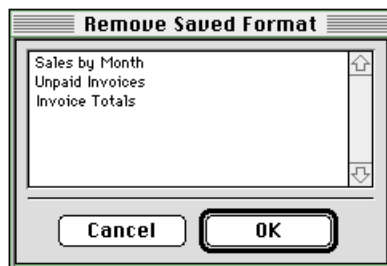
Select the formats that you want to remove and click 'OK.' Informed Filler removes the selected formats from the Formats submenu.

Adding a New Record

When you create a new untitled data document using the New Document command under the File menu, Informed Filler automatically adds a new blank record ready for filling.

If you want to add a new record to an existing data document, choose **Add Record** from the Database menu. Informed Filler will create a new blank record, fill in any default values and auto-incrementing cells, then select the first cell on the form. The new record is added after the last record in your data document. It also becomes the last record in the collection.

While the new record is active you can enter information to complete the form. A small pencil in the collection information box indicates that the record is active. For complete instructions on how to fill out a form, please see Chapter 3, "Filling Out Forms."

When you finish filling out the new form, press the Enter key on the numeric keypad. Pressing Enter indicates to Informed Filler that you've finished entering information and that the record should be accepted.

Editing an Existing Record

To edit an existing record, first find the record using either the Find command or the various browsing commands (see "Finding Records and Browsing Through Records"). With the form window in front, activate the record by pressing Tab or clicking to select a cell. While the record is active, you can move from cell to cell and enter or change information. A small pencil in the collection information box indicates that the record is active.

When you're finished editing the record, press the Enter key on the numeric keypad, or Ctrl/Return (Windows), or Cmd/Return (Mac OS) to accept the record. For complete instructions on how to fill out or edit a record, please see Chapter 3, "Filling Out Forms."

Reverting a Record

From time to time you might make unintentional changes to a record's information. Informed Filler makes it easy to cancel any changes that you've made to a record.

The Revert command reverts the current record to its most recent version—that is, the version prior to last activating the record. If you revert a newly created record, Informed Filler will clear the record to its blank state and fill in any default values.

To revert the current record, choose **Revert** from the Database menu. Informed Filler will request your confirmation.

Clearing a Record

To erase the information on a new or existing record, use the Clear Record command. If the form window is in front, Clear Record will clear the current record. If the Record List window is in front, the single selected record will be cleared instead. You can't select and clear multiple records on the Record List at the same time. If two or more records are selected, the Clear Record command will be unavailable.

Like the Add Record command, Clear Record automatically fills in the default cell values after clearing the record. The form window is then activated for editing.

Note   The Clear Record command doesn't clear any attachments, or the values of auto-incrementing cells.

To clear the current record or the selected record on the Record List, choose **Clear Record** from the Database menu. Informed Filler requests your confirmation before completing the operation.

Duplicating a Record

Often you'll want to duplicate an existing record to avoid retyping the same information. For example, you may want to enter two invoices for the same customer. Rather than retyping the same customer information, simply enter and duplicate the first invoice then make the necessary changes to complete the duplicate record.

To duplicate a record, choose **Duplicate** from the Database menu. If the form window is in front, Informed Filler will duplicate the current record. If the Record List window is in front, the single selected record will be duplicated instead. You can't select and duplicate multiple records on the Record List at the same time.

Finding Records

Use the Find command to find and display specific records in your data document. You find records by providing information—called *search criterion*—that identifies the records that you're looking for. You can find a single record or you can find all records that match your search criterion.

Informed Filler lets you find on any cell with the exception of pictures and signatures. To find records, choose **Find...** from the Database menu. The Find dialog box appears.

Click to select a cell…   …or a column…

…then choose the Find command.

The Find dialog box contains a text box where you type the value you're looking for. This value is called the *search value*. The scrolling list contains the names of all cells on the form. Select the cell that you want Informed Filler to search in. If you're unsure of the name of the cell that you want to search in, simply click the cell on the form window while the Find dialog box is displayed and that cell will be automatically selected in the scrolling list.

Note   If you select a cell on the form or a column on the Record List before choosing the Find command, Informed Filler will automatically select the corresponding cell on the Find dialog box.

You can have Informed Filler find exact matches, partial matches, or a range of values by selecting an appropriate match option. These options are described later in this chapter. See "Match Options."

Your choice of find option determines which records Informed Filler will look through, and the action taken when records are found. For example, you might want to look through all records and replace the collection with those found. Or maybe you'll combine the records found with those already in the collection. For more information, please see "Find Options" later in this chapter.

After you enter the search value and choose the match and find options, click 'Find' to begin searching. As Informed Filler searches, the information box on the window in front displays progress information. If no records match, you'll see a message indicating that no records were

found. If at least one match is found, Informed Filler will act according to your choice of find option (see "Find Options").

Match Options

Match options allow you to find exact matches, partial matches, or ranges of values. For example, instead of searching for an exact telephone number, you might want to find all numbers that contain the area code '408.' Or maybe you want to find all invoices with a total amount greater than or equal to $500.

The 'Match option:' drop-down list offers ten different matching options. The following table lists each option with a brief description.

Match Options

Option	Description
starts with	finds values that start with the text search value
ends with	finds values that end with the text search value
contains	finds values that contain the text search value
is equal to	finds values that match the search value exactly
is not equal to	finds values that do not match the search value exactly
is greater than	finds values that are greater than the search value
is greater than or equal to	finds values that are greater than or equal to the search value
is less than	finds values that are less than the search value
is less than or equal to	finds values that are less than or equal to the search value
range	finds values that are within a range of values

All match options with the exception of 'range' accept a single search value. When you select 'range,' the Find dialog box changes to allow for two search values.
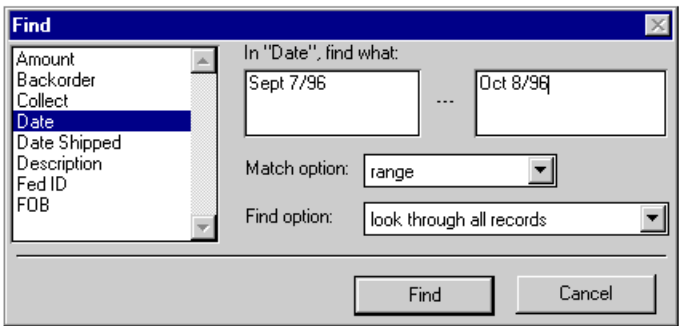
With the 'range' option selected, Informed Filler will find all values that lie between and including the two search values. The second search value must be greater than the first. With the settings in

the previous dialog box figure, Informed Filler will find all dates greater than or equal to Sept 7, 1996, and less than or equal to Oct 8, 1996.

Finding Words

When you find records by searching in a text cell, Informed Filler will try to match the search value with each individual word in the cells that are examined. For example, if you search for the value 'Christmas bonus' in the comment cell on your forms, Informed Filler will find all records with comments that contain both words (regardless of position and order).

```
In "Comments", find what:

Christmas bonus ──────┐
                       │
                       │
                       │
          Comments     │
This Christmas, all    │
employees shall receive a │
bonus. ────────────────┘
```

If you use match options such as 'starts with' or 'ends with,' the option is applied as each word of a cell is examined.

Finding Dates and Times

When you enter a date or time search value, you can type the value in any format you like. You can type a complete value or only certain parts of a value. If you enter a partial value, Informed Filler will ignore the parts that are missing. For example, suppose that you want to find all sales slips that were entered in May of 1996. You could either use the 'range' match option and enter 'May 1, 1996' as the first search value and 'May 31, 1996' as the second, or you could use the 'equals' match option and enter 'May 1996' as the single search value.

Finding Names

As explained in "Entering Names" (see Chapter 3), a name value consists of up to five different parts: the prefix, first name, middle name, last name, and suffix. Multiple prefixes, middle names, and suffixes are allowed. A name value displays on your form according to the format of the cell in which it's stored.

When you type a name search value, you can enter all parts or only certain parts of the name. Like dates and times, if you leave out a name part, Informed Filler will ignore that part when it compares name values. For example, you could enter the search value 'Smith' to find all names with a last name 'Smith,' whereas the search value 'John Smith' would find all names with a first name 'John,' and a last name 'Smith.'

If you type a name that consists of only one part, Informed Filler will interpret that part as the last name. If you type more than one part, the order of each part is used to interpret the name. If a comma appears next to the first part, that part is assumed to be the last name. A list of known prefixes and suffixes is used to help properly identify each name part. This list can be found in Appendix A.

If you want to find all names that have a particular first name, you must enter the wild card symbol (*) as the last name when you type the search value. This is because, as explained above, if you type the first name alone, Informed Filler will assume that it's the last name. By typing the first name followed by the wild card symbol, the name parts will be interpreted properly. For example, to find all names where the first name is 'John,' enter the search value 'John *' (note that there's a space between 'John' and '*'). The wild card symbol tells Informed Filler to ignore the last name when comparing name values. To enter the wild card symbol, type the asterisk key.

If you use an inequality match option ('is less than,' 'is less than or equal to,' 'is greater than or equal to,' or 'is greater than'), Informed Filler will compare the parts of two names in the following order: last name, first name, middle name, prefix, then suffix. When a name part in the search value is found that doesn't equal the corresponding part in the comparison value, the match option determines whether or not the name matches the search value.

Finding Boolean and Checkbox Values

Boolean and checkbox cells can take on one of two different values. When you find records using a boolean or checkbox cell, Informed Filler displays the two possible values on the Find dialog box. For example, if a boolean cell has the Yes/No format style, the Find dialog box will look like this:
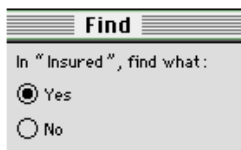
Rather than typing a search value, simply select the value by clicking either of the two choices. The only match option available is 'equals.'

Find Options

The 'Find options:' drop-down list contains six different find options. These options let you choose what happens when Informed Filler finds the records you're searching for.
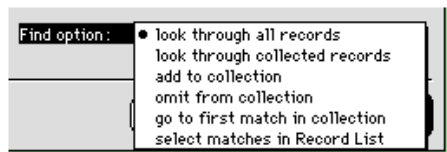
Often you'll want to collect records that match different search criteria. For example, you might want to find and print all invoices that you entered today along with those that are overdue. Or maybe you want to print the purchase orders that were filled this week with the exception of those being shipped outside of North America. By using different find options and commands such as Omit and Omit Others, you can easily collect the specific records that you're interested in.

If you'd like to find all records that match a particular search value, choose the 'look through all records' option. Informed Filler will search through all records and replace the collection with those found.

The second option, 'look through collected records,' is useful if you want to find records that match more than one criteria. For example, suppose that you want to find all invoices for customers in New York that have a total charge greater than $500. First look through all records to find the invoices for customers in New York. Then search through those records—that is, the collected records—to find only those with a total charge greater than $500.

The 'add to collection' option is useful if you want to combine other records with those currently in the collection. For example, you might want to find and print all invoices for customers in both New York and Boston. First use the 'look through all records' option to find the invoices for customers in New York. Then find the invoices for customers in Boston using the 'add to collection' option. Informed Filler would add the records found to the collection. The collection would therefore contain all invoices for customers in New York and customers in Boston.

The 'omit from collection' option allows you to remove records from the collection. After performing the command, Informed Filler will display the number of records that were found and omitted from the collection.

Since the collection must always contain at least one record, Informed Filler will automatically perform the Find All command if you attempt to omit all records. The Find All command simply places all records in the collection (see "Finding All Records"). Informed Filler will warn you before performing the command.

Unlike the first four find options, the 'go to first match in collection' option does not change the contents of the collection. Instead, it simply searches for and reveals the first record in the collection that matches the search value. This option is useful if you want to browse through a set of collected records. Let's say that you've found all invoices for customers in New York, and now you want to find the first one for John Smith without disturbing the collection. Rather than using commands such as Next, Previous, First, and Last to view each record individually, you could use the Find command and the 'go to first match in collection' find option. Informed Filler finds the first record that matches and makes it the current record. If the Record List window is frontmost, you'll see the record selected.

If the Record List window is frontmost when you choose the Find command, the 'selected matches on Record List' find option will be available. With this option selected, Informed Filler will select the records that match on the Record List.

After using the Find command with the 'go to first match in collection' find option, you can reveal the next record that matches by choosing **Find Again** from the Database menu. This command repeats the find starting with the record immediately following the current record.

Indexed cells

When a form is created with Informed Designer, the designer can choose which cells have indexes. An index is a pre-sorted list of cell values that Informed Filler maintains automatically as you add, remove, and change records. Although you never *see* an index, you can certainly notice its effect when you use the Find command to find records.

If a cell is indexed, Informed Filler can quickly search through thousands of records to find a matching value. Depending on the speed of your computer and the number of records in your data document, searching can be as fast as one or two seconds. If a cell is not indexed, each record must be examined individually to find those that match the search value. Searching can take considerably longer if a cell is not indexed.

Finding All Records

Various commands allow you to browse through the records in your data document. You can use commands such as Next, Previous, First, and Last to view and edit each individual record in the collection. The records in the collection also appear listed on the Record List.

The Find All command places all records in the collection, allowing you to list or browse through all records in your data document.

Sorting Records

With the exception of picture cells and signature cells, Informed Filler lets you sort any cell on your form. To sort the records in the collection, first select the cell that you want to sort by either clicking it on the form window or selecting its column on the Record List. Then choose **Sort...** from the Database menu. The Sort dialog box appears.

You can sort a cell in either ascending or descending order. Select your choice, then click 'OK.' Informed Filler displays progress information as sorting occurs.

Once the sorting process has started, you can cancel the Sort command by clicking 'Cancel' on the progress dialog box. If you cancel sorting, the order of the records in the collection will remain unchanged.

To sort records by two or more cells, simply sort each cell individually, starting with the least significant cell and ending with the most significant cell. For example, suppose that the Record List contains the Sold To and Total cells of an invoice form. To obtain a list of invoices sorted alphabetically by the value in Sold To, and by the Total within each Sold To value, sort the Total cell first, then the Sold To cell.

Note
The sorted order of records in the collection is not preserved as you add and change records, or when you close the data document. You can, however, tag the collected records using commands in Informed Filler's Tags submenu. See "Tagging Records" later in this chapter for more information.

A certain amount of memory is required to sort a cell. If Informed Filler can't obtain the required memory, you'll see a message indicating so.

Omitting Records

In addition to the 'Omit from collection' option of the Find command, Informed Filler provides two commands for omitting records from the collection.

With the form window in front, the Omit command omits the current record—that is, the one that's visible in the window. The next record in the collection becomes the current record. If there's no next record, the previous record is made current instead. To omit more than one record, select each record on the Record List, then choose **Omit** from the Database menu. The following figure shows the Record List window before and after omitting the selected records.

Since the collection must always contain at least one record, Informed Filler won't let you omit the last record. If there's only one record in the collection, or if you've selected all records on the Record List, the Omit command will be unavailable.

The Omit Others command also omits records from the collection. If the form window is in front, all records except the current record are omitted. If the Record List window is in front, Omit Others omits all records that are not selected.

If the collection contains only one record, or if either all records or no records are selected on the Record List, the Omit Others command will be unavailable.

Browsing Through Records

The Go To submenu under the Database menu contains five commands for browsing through the collection of records. They are: Record, Next, Previous, First, and Last. The Record command allows you to move to a specific record in the collection. When you choose **Record...**, Informed Filler displays the Change Record dialog box.

Type the number of the record that you want to go to, then click 'OK.' The number that you type must be within '1' and the number of records in the collection. The record that you specified becomes the current record and is displayed in the form window. As a shortcut to choosing the Record command, you can double-click the record information box to display the Change Record dialog box.

The Next and Previous commands move you one record forward or backward respectively. The First and Last commands move you to the first or last records in the collection.

You can also browse through collected records by clicking either arrow in the collection information box.
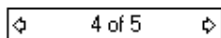
⟐   4 of 5   ⟐ — Selects next record

Selects previous record

Clicking the right or left arrow performs the Next or Previous command, respectively. If the current record is the first one in the collection, the left arrow disappears. The right arrow disappears if the current record is the last one in the collection.

Removing Records

The Remove command permanently removes records from your data document. You can remove the current record, or you can remove selected records on the Record List. If the form window is in front, the Remove command removes the current record only. If you want to remove more than one record, select each of them on the Record List, then choose **Remove** from the Database menu. In any case, you'll be warned before the command is performed.
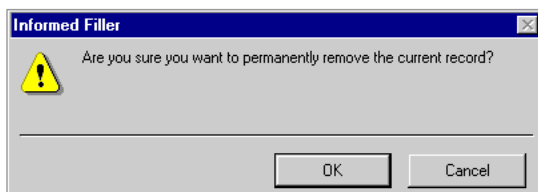
To continue, click 'OK.' To cancel the Remove command, click 'Cancel' instead. If you hold down the Alt (Windows) or Option (Mac OS) key while choosing the Remove command, the current record is removed without your confirmation.

After removing the current record, the next record in the collection will become the current record. If there's no next record, the previous record will be made current instead. If you remove the last remaining record in the collection, Informed Filler will automatically perform the Find All command and display the following message:
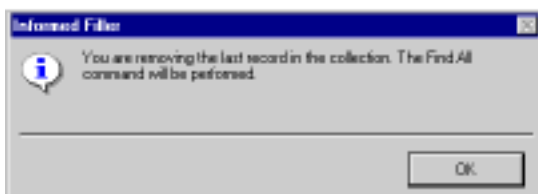
Click 'OK' to continue. All remaining records in the data document will be placed in the collection. See "Finding All Records" for more information about the Find All command.

Tagging Records

Informed Filler's Tag feature provides an easy way for you to identify unique collections of records so that they can be quickly recalled and viewed. For example, if you were processing a batch of expense forms and found that some of the expenses needed clarification before they could be paid, you could mark those particular records with a tag such as "Clarify before processing." You could then process all the other expense forms first, and easily recall the collection of tagged records later by choosing the tag name from a list.

To tag a collection of records, find the records, then choose **Tag Records...** from the Tags submenu under the Database menu. The Tag Collected Records dialog box appears.

Type the name of the tag in the text box and click 'OK.' Your entire current collection will be tagged, and the name of the tag will be displayed in the Tags submenu.

In certain cases, Informed Filler will automatically tag a collection of records for you. For example, if you submit a batch of records to your company database, and an error occurs that prevents some of the records from being accepted, Informed Filler will mark those records with a tag such as "Records not submitted" and insert the tag name in the Tags submenu.

To recall a tagged collection of records, simply choose the tag name from the Tags submenu. Informed Filler returns the records associated with that tag as the current collection.

Note   Recalling a tagged collection is not the same as performing a find. For example, if you found 25 invoices over $100, and then tagged that collection as "Invoices over $100," the tag only applies to those particular records. If you add another 20 invoices over $100 to your data document and then choose the "Invoices over $100" tag, Informed Filler will reveal only the original 25.

Adding Records to a Tagged Collection

Often, you might want to include additional records in a tagged collection. Suppose that you've processed all the expense forms for the month and tagged the collected records as "Expenses 09/96." At the last minute, the VP of Sales and Marketing submits one that had been forgotten. After processing the extra form, you'll want to include that record in your "Expenses 09/96" collection.

To add records to an existing tagged collection, do a find that will return the tagged records as well as the records that you want to add, then choose **Tag Records...** from the Tags submenu under Database. Type the original tag name in the text box and click 'OK.' You'll see a message asking you to confirm if you want to replace the original tag with the new one (the original collection plus the new records).

Removing a Tag

If you no longer require a particular tag, you can remove it by choosing **Remove Tag...** from the Tags submenu. The Remove Tag dialog box appears.

Select the name of the tag that you want to remove and click 'OK.'

Note   When you remove a tag, you're only removing a reference to that collection of records, not the records themselves.

9 Printing Forms

In this chapter:

9 Printing Forms

This chapter describes printing forms with Informed Filler. You can print forms on printers that are compatible with the Windows and Mac OS operating systems. For instructions on installing printer software and choosing your printer, please see your printer's documentation.

Page Setup

Before you print a form, you may want to check or change the page setup. The Page Setup command allows you to set the standard page options supported by your printer. Use it to choose the paper size and control printing related options such as page orientation. Although the form designer configures the page setup during the form design process, you may want to change the page setup to accommodate different paper sizes or scaling.

Before setting the page options, make sure that your printer is properly set up and connected to your computer. Also make sure it's the currently active or chosen printer. With the form window in front, choose **Page Setup...** from the File menu. You'll see the Page Setup dialog box associated with your printer.

If you're using an HP LaserJet (or compatible) printer, you'll see a dialog box similar to the one shown in the following figure.
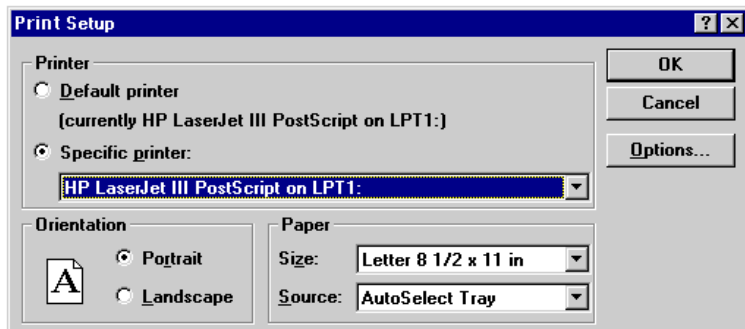
If you're using an Apple LaserWriter printer (or a printer that uses Apple's LaserWriter driver), you'll see a dialog box similar to the one shown below.
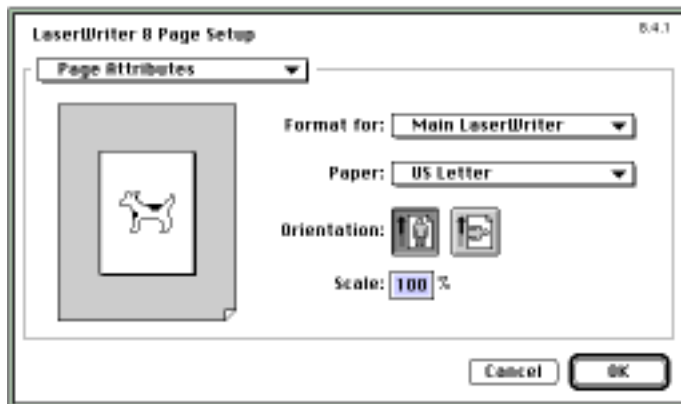
If you're using an Apple ImageWriter printer, choosing the Page Setup command will show a dialog box similar to this:
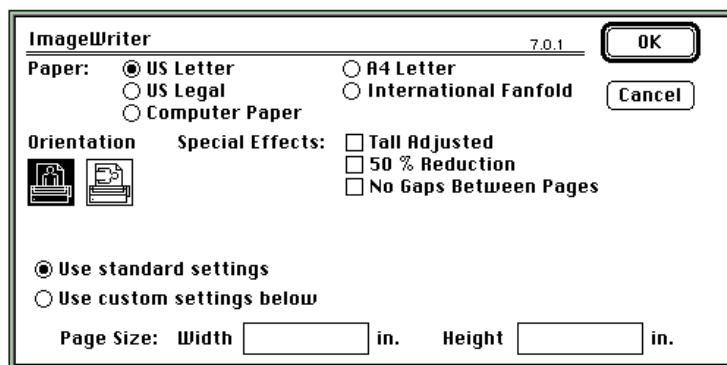
When using an ImageWriter printer you can specify custom paper sizes. This is necessary when you print onto pre-printed forms or labels of non-standard sizes. Setting the custom paper size will ensure that the proper length of paper is fed through the printer each time a form is printed.

If you choose the 'Use standard settings' option, the paper size is determined by your selection of a standard size. If you want to use a non-standard size, click the 'Use custom settings below' choice, then enter the custom width and height in the text boxes provided. The values that you enter are independent of whether you choose landscape or portrait printing. That is, even if you select landscape printing, you still enter the width and height of the physical sheet that exits the printer.

The size of a pixel (one dot) on the Mac OS compatible screen is slightly wider than the size of a pixel on the ImageWriter printer. As a result, the width of a printed object appears slightly narrower than its corresponding size on the computer screen. For example, a horizontal line that measures 8 inches on the screen will be approximately 7.5 inches long when it's printed.

The Tall Adjusted option on the ImageWriter Page Setup dialog box adjusts the size of the printed pixel so that an object's printed size matches exactly with its corresponding size on the screen. Click the 'Tall Adjusted' checkbox on the ImageWriter Page Setup dialog box to turn this option on.

Printing Preferences

When you print forms, Informed Filler allows you to choose whether you want to print both the data and the template (that is, the graphical image that you see in the form window) or the data only.

When printing onto blank paper, you normally print both the data and the template. The printed form appears exactly as it's displayed on your screen. When printing onto pre-printer paper forms that already show the text, graphics, and blank fields, you print the data only.

To set this option, choose **Preferences...** from the Edit menu. The Preferences dialog box appears. Click the 'Printing' icon in the scrolling list. The Preferences dialog box changes to show the Printing Preferences panel.
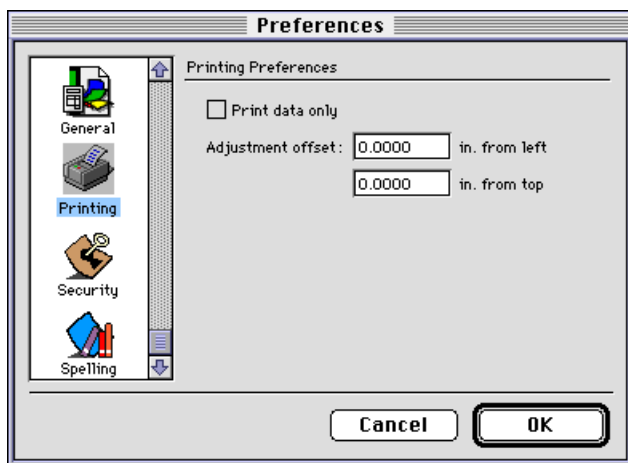
To print the data without the template, click the 'Print data only' checkbox, then click 'OK.'

The Printing Preferences panel also contains two text boxes in which you can specify an offset adjustment for printing. This feature allows you to adjust the position of the form on the printed page.

When printing data onto pre-printed forms, the offset adjustment feature is useful for accurately aligning the data with the blanks on the pre-printed form. The entire form is shifted by the distance specified in the 'Offset Adjustment' text boxes. Positive values shift the form down and to the right. Entering negative values has the opposite effect.

The unit of measure is set by the form designer, although you can override this setting by typing the abbreviation for the units you'd like to enter. For example, typing '1.0 pt' will enter a value of 1 point.

Printing Forms

To print one or more forms, choose **Print...** from the File menu. The Print Job dialog box will appear.

If you're using an HP LaserJet (or compatible) printer, you'll see a a Print Job dialog box like this:
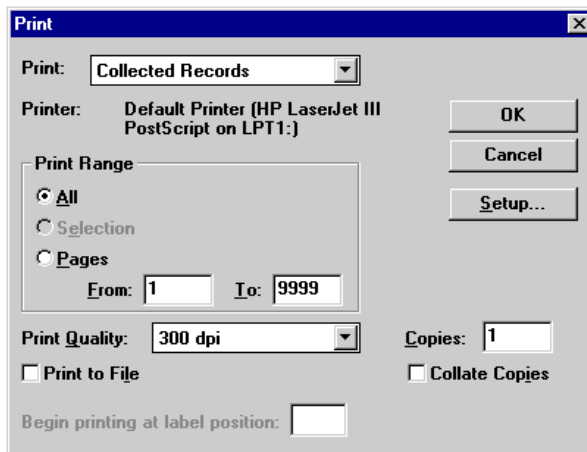
If you're using an Apple LaserWriter printer (or a printer that uses the Apple LaserWriter print driver), you'll see a Print Job dialog box similar to this:

The previous illustration shows the 'General' print options available. You can display printing options specific to Informed Filler by clicking the panel's drop-down list and choosing the 'Informed Filler' option.

```
                                                                    8.4.1
   Printer: Main LaserWriter ▾          Destination: Printer ▾

      Informed Filler®            ▾

   Print: Current Record      ▾      ☐ Collate

   Start printing at label position    [    ]
```
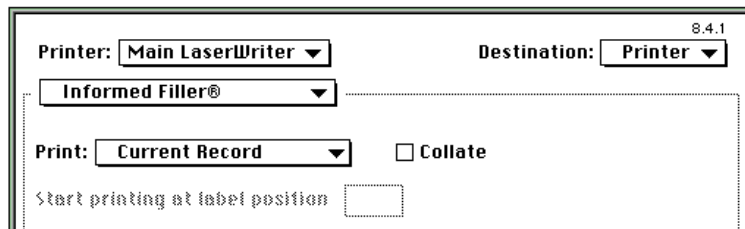
Some of the options pictured are not available when you print records in a list. For more information, see "Print Options" later in this chapter.

When the size of a form is larger than the selected paper size, Informed Filler will *tile* the form onto multiple sheets of paper. For example, suppose that you're printing a tabloid size form (11" by 17") on standard US letter sheets (8.5" by 11"). Informed Filler will produce four sheets of paper for each copy of the form that you print.

If you choose a different paper size (see "Page Setup"), Informed Filler will automatically readjust the tiling to print properly on the new paper size.

After you select your printing options, click 'Print' to begin printing. Informed Filler will display this progress dialog:

```
   🖨  Printing...
       Record 2 of 34, page 1        [ Cancel ]
```

You can cancel printing at any time by clicking 'Cancel.'

Print Options

When printing from the form window, you can use Informed Filler's print options to do any of the following:

▪ print either the current or collected records
▪ print a blank form
▪ print the form's work page
▪ collate the printed forms

With the form window in front, choose **Print...** from the File menu. The Print Job dialog box appears. Click the 'Print' drop-down list and make a selection from the available options.

Print: ✓ **Current record**
      Collected records
      Blank form
      Work page
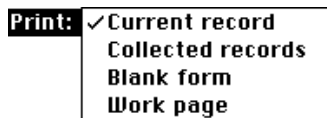
Choosing the 'Current record' option prints only the current record (that is, the record displayed in the form window). Choosing the 'Collected records' option prints all records in the current collection.

If you select the 'Blank form' option, Informed Filler will print the form template without any data. Use this option to print a blank copy of your form.

As discussed in Chapter 3 (see "Pages of a Form"), a form's work page is a place to put instructions or information about the form. When you select the 'Work page' option, Informed Filler prints the work page instead of the numbered pages of the current record.

Collating Forms

For printing multiple page forms, Informed Filler offers two different page ordering options. When you print two or more records, the 'Collate' option determines the page ordering. If you leave this option unchecked, Informed Filler prints the records one page at a time—that is, all page ones, then all page twos, and so on.

If you check the 'Collate' option, Informed Filler prints each complete record individually—that is, all pages of the first record, then all pages of the second record, and so on. By using this option, you can avoid having to manually collate each form.

Printing Repeating Forms

The form designer can repeat a form's drawing area across and down the printed page. This feature is useful, for example, if you want to print mailing labels on sheets like the one shown in the following figure.

When you print more than one label, Informed Filler automatically fills the sheet starting at the top left of the page and working across and down. Therefore, printing five labels would produce a sheet like the one shown below.

Informed Filler allows you to specify which area to begin printing. This means that instead of always starting with the drawing area that's positioned at the top left corner of the page, you can choose any area as a starting point. For example, suppose that after printing five labels on a new sheet (as illustrated in the previous figure), you now want to print three more using the same sheet. You want the first address to print on the sixth label on the sheet.

If the drawing area of your form is repeated, you can enter a value in the 'Begin printing at label position' text box on the Print Job dialog box.

The 'Begin printing at label position' value determines on which drawing area printing will begin.

Printing From the Record List

If the Record List window is in front, you can print either all records in the collection, or only those which are selected on the Record List. You can also choose whether to print the records in a list or as individual forms.

With the Record List in front, choose **Print...** from the File menu. The following dialog box appears.
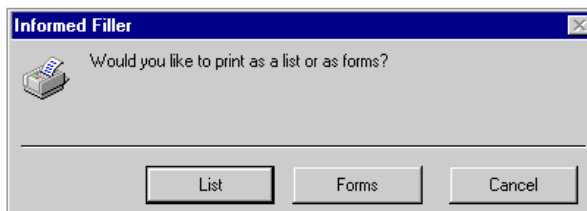
The Print dialog box contains the 'Forms,' 'List,' and 'Cancel' buttons. If you click 'List,' Informed Filler prints a columnar list of the records on the Record List. If you click 'Forms,' the records are printed as individual forms. Clicking 'Cancel' cancels the Print command.

After you click the 'List' or 'Forms' button, the Print Job dialog box appears.

With at least one record selected on the Record List, the 'Print' drop-down list contains the 'Current record,' 'Entire Record List,' and 'Selected records' options. If no records are selected on the Record List, the 'Selected records' option is unavailable.

If you're printing the records on the Record List as forms, then the 'Collate' and 'Begin printing at label position' controls function the same as when printing from the form window (see "Print Options"). If you're printing the records in a list, these controls are unavailable.

Printing Records in a List

By printing the Record List in a list rather than as individual forms, you can produce summary reports similar to the one shown in the following figure.

Each printed sheet contains a header that shows the current date, the name of the document, and the page number. If the total width of the Record List exceeds the printable width of a page, Informed Filler will automatically tile the Record List. For information about formatting the Record List to show only the information that you want, see "The Record List" in Chapter 8, "Manipulating Records."

To print the Record List in a list, choose **Print...** from the File menu while the Record List window is active. On the dialog box that appears, click the 'List' button. The Print Job dialog box appears.

Select the 'Current record', 'Entire Record List', or 'Selected records only' option from the 'Print' drop-down list, and click 'Print.'

Note   If you want to print only a selection of records from the collection, you must select those records on the Record List before you choose the Print command. Once the records are selected and the Print command is chosen, you can choose the 'Selected records only' option on the Print Job dialog box.

10 Mailing Forms

In this chapter:

10 Mailing Forms

Many types of forms must be sent from person to person for approval and processing purposes. For example, it's very common for a purchase requisition form to be filled out by the requestor, sent to a supervisor for approval, and then forwarded on to the purchasing department. In large organizations, a single form might go through several levels of approval before the process is complete.

Through the use of Informed mail plug-ins, Informed Filler connects directly to various electronic mail systems, making it easy for you to send completed forms right from within the Informed Filler environment. With plug-ins, Shana can easily support new e-mail systems by simply implementing new mail plug-ins.

For details of the specific e-mail systems supported by Informed Filler, see the "Mail Plug-ins" topic in Informed Filler's on-line help system.

Most e-mail systems allow you to attach a file to a message so that it is included with the message when sent to the recipient. When you send a form using Informed Filler's Send command, Informed Filler automatically creates a file containing the record, or records, you want to send, then attaches the file to an e-mail message and sends it to the recipient.

The form designer can pre-configure a list of suggested routes for a form template. Suggested routes are intended to provide guidance regarding the person or place that you might send a form to. You can send a form to a suggested route, or you can manually address a form to any person or place you like.

Mail Preferences

As mentioned previously, Informed Filler can send forms using a variety of different e-mail systems. You can use Informed Filler's Preferences command to specify your preferred mail system so that you're not asked to select which one each time you send a form.

To specify your preferred mail system, choose **Preferences…** from the Edit menu. When the Preferences dialog box appears, click the Mail icon in the scrolling list. The dialog box changes to show the Mail Preferences panel.
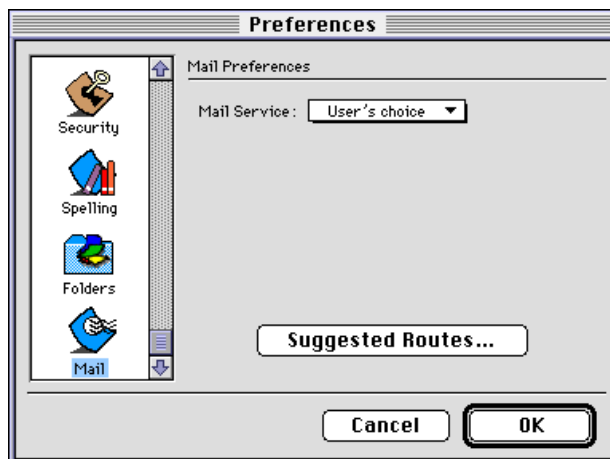
Click the 'Mail service' drop-down list and make a selection from the available choices. The choices in the 'Mail Service' drop-down list correspond to the Informed mail plug-ins you have installed in your plug-ins folder. If you select the 'User's choice' option, you'll be asked to select a mail system each time you send a form.

The 'Suggested Routes...' button allows you to define your own suggested routes for your form templates. See "Adding, Changing, and Removing Suggested Routes" later in this chapter for more information.

The Send Command

To mail one or more records, choose **Send...** from the File menu. If there are no suggested routes for the template you're using, your plug-ins folder contains more than one mail plug-in, and you have not previously specified your preferred mail system, you'll be asked to select a mail system to use.
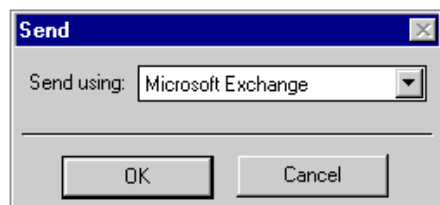
Select a mail system from the 'Send using' drop-down list and click 'OK.' The subsequent Send dialog that appears and the corresponding method of selecting recipients varies depending on which mail system you use. The following example shows the Send dialog box for Microsoft Exchange.

You can select which records to send by choosing an option from the 'Send' drop-down list. If the form window is active when you choose the Send command, the options include 'Current record' and 'Collected records.' When the Record List is active, you can select from the 'Current record,' 'Entire Record List,' or 'Selected records' options.

You specify one or more recipients using the method that corresponds to the mail system you're using. You can also enter a subject and choose the format in which to send the record or records. The following table lists the data formats available in the 'Send As' drop-down list and gives a brief description of when you would use each one.

Data Formats

Data Format	Description
Informed data	Informed data is Informed's own proprietary format for storing form data. Each Informed data document is a database that contains all the data for one or more records. Use this format when mailing forms to another user who already has the appropriate template needed to view the data. This is the most common data format to use when sending forms.
Informed package	Informed package contains both the data and template for a form. Use this format if the person you are mailing the form to doesn't have the appropriate template needed to view the data.
Informed Interchange	Informed Interchange files contain the data for one or more records and are used primarily for transferring information between different applications, and different versions of Informed Filler.
Tab and comma delimited text	The delimited text file format is a standard format that's used primarily for transferring information between Informed Filler and other applications. Use the Comma or Tab delimited text formats when mailing forms to someone who needs to import the data into another application such as a spreadsheet, word processor, or another database.

The form designer can lock the data format to prevent you from accidentally choosing an incorrect setting. If the data format has been locked, you will not be able to select a different format from the 'Send as' drop-down list.

Once you've selected one or more recipients and specified the subject, the send format, and which records to send, click 'Send' or 'OK' to initiate the send process. Informed Filler creates a file containing the record, or records, you specified and attaches it to the e-mail message for transmission to the recipient. You'll see a progress dialog as sending proceeds.

Note   When Informed Filler creates the file that is attached to the e-mail message, it names the file according to the *filename.ext* format of DOS filenames. That way if the recipient of the form, or forms, uses a Windows compatible computer, the file attachment will have the correct file extension for use with Informed Filler.

Selecting a Suggested Route

If the form template you're using has one or more suggested routes defined, choosing Send displays a different dialog box.

A suggested route is a named step in the processing of a form. The route name is intended to iden-
tify the step and instruct the user as to where the form should be sent. For example, a time card
form might be filled out by an employee, sent to a manager for approval, and then forwarded to the
payroll department. To make it easy for each person in the process to know where to send the form
next, suggested routes named "Send To Approving Manager" and "Send to Payroll" could be added
to the form template. Also included with each suggested route are send parameters such as the
names of recipients and a subject for the mail message.

You specify which records to send by selecting an item from the 'Send' drop-down list.

To send to a suggested route, simply select the route, then click 'Send.' If the suggested route is
fully specified (that is, it includes one or more recipients), Informed Filler automatically sends the
record or records.

If no recipients have been specified for the suggested route, Informed Filler will display the Send
dialog box for the mail system used by the route. After you select one or more recipients, click
'Send.' When the send process completes, Informed Filler displays a dialog box asking if you'd like
to save the recipient(s) you specified with the suggested route. If you click 'Yes,' you will not have
to specify the address(es) for that particular suggested route again.

Even if the form template has one or more suggested routes, there might be instances where you
want to send the form to someone or some place else. For example, if the supervisor you normally
send forms to is away on vacation, you might want to re-route your form to his or her manager
instead. Click the 'Re-Route' button on the Send dialog box to specify a different address. Again,
the Send dialog box specific to the mail system you use appears, allowing you to address and send
your form.

Mail Cells

To aid in addressing forms and specifying various send options, the form designer can take advan-
tage of mail cells. A mail cell is a cell whose value is used to specify a send option or parameter.
For example, when you mail a form, Informed Filler looks for a cell named 'Mail Send To.' If such
a cell exists, the form is automatically addressed to the name in that cell.

Other mail cells can be used to automatically enter other parameters such as the subject, with information on the form. The following table shows the four mail cells supported in Informed.

Mail Cells

Mail Cell	Description
Mail Send To	The name of the mail recipient. The value in this cell must identify a valid user in the directory of your e-mail system.
Mail Subject	The subject of the mail message.
Mail Comment	The body of the mail message.
Mail Enclosure	The filename of the enclosure sent with the mail message.

By calculating a mail cell, the form designer can have a formula automatically check for different conditions and automatically set certain parameters accordingly. For example, if a purchase order form needs to be sent to a supervisor for approval, the form designer could calculate the 'Mail Send To' cell so that the recipient of the form is based on the value of the purchase order.

Form Tracking

If the form designer has configured the form template to automatically track forms, Informed Filler will connect to the tracking server after the send process completes. Depending on how form tracking was configured, you may be requested to enter information, such as your name and password, when this occurs.

For more information about form tracking, see Chapter 11, "Form Tracking."

Adding, Changing, and Removing Suggested Routes

Informed Filler allows you to define your own suggested routes for your form templates by using the Preferences command.

Choose **Preferences...** from the Edit menu. When the Preferences dialog box appears, click the Mail icon in the scrolling list. The dialog box changes to show the Mail Preferences panel.
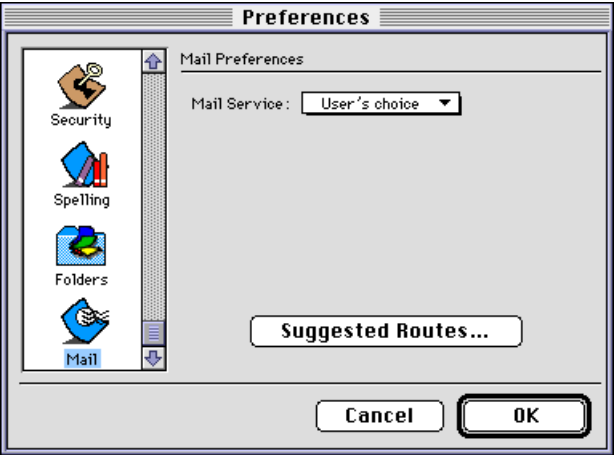
To access the controls for defining a suggested route, click the 'Suggested Routes...' button. The Suggested Routes dialog box appears.
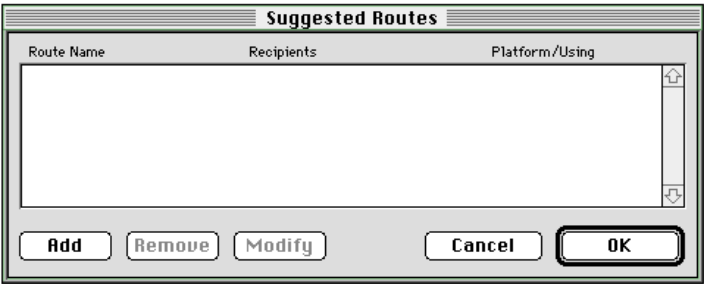
The Suggested Routes dialog box contains various controls for editing suggested routes, and a scrolling list showing any suggested routes that are already configured.

When you click 'Add,' the Suggested Route Details dialog box appears.
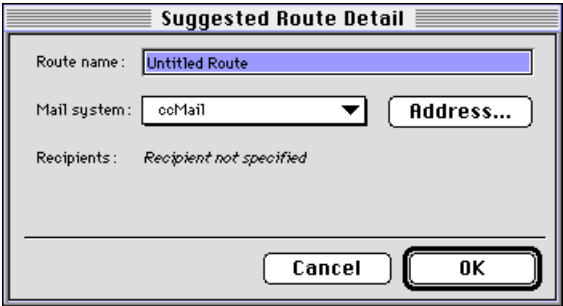
Type the name of the route in the 'Route name' text box. It is helpful if the route name describes the actual step in the routing process.

Specify the mail system to use by clicking the 'Mail system' drop-down list and making a selection from the available choices. The choices in the 'Mail system' drop-down list correspond to the Informed mail plug-ins you have installed in your plug-ins folder.

To specify a recipient, click the 'Address...' button. If you have the appropriate e-mail software installed, Informed Designer displays the Send dialog box for the selected mail system. Simply select one or more recipients by using the controls on the addressing dialog box.

While the addressing dialog box is displayed, you can also specify a subject for the form, and select the data format that the form will be sent in.

Note   If the form designer has locked the data format to be used when mailing the form, that data format will take precedence over the one you specify for a suggested route.

To edit an existing suggested route, select it in the scrolling list on the Suggested Routes dialog box, then click the 'Modify' button. The Suggested Route Detail dialog box appears, allowing you to change the specific details for the selected route.

To remove a suggested route, select it in the scrolling list, then click 'Remove.'

You can change the order of suggested routes in the scrolling list by clicking a route and dragging it either up or down with the mouse.

10-10 : **Mailing Forms**

11 Form Tracking

In this chapter:

11 Form Tracking

Many forms are routed from person to person for approval purposes. Chapter 10, "Mailing Forms," explains how you can mail a completed form to another person using your electronic mail system. This chapter describes Informed Filler's form tracking features.
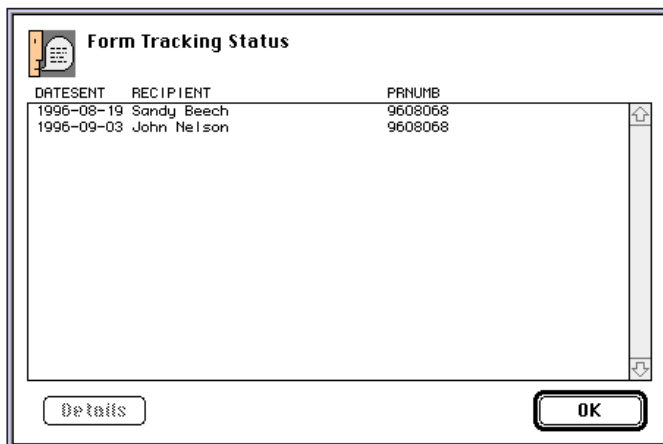
The purpose of form tracking is to provide you with a quick and easy way to find out where a form is in the routing process. After filling out a form and sending it to the next step, you can choose a single command to see any subsequent steps that the form has travelled, and on whose desk the form currently sits. Form tracking provides a quick alternative to "physically" tracing the path of a form to find its current location.

How it Works

When you send a form to another person, the data of the form is stored in a file and attached to an electronic mail message. The message, along with the attached form data, is sent to the recipient using one of the supported e-mail systems. The recipient receives the "original" form whereas you retain a "copy." The recipient views the form, perhaps filling in more data, and sends the form to the next step in the routing process.

In order to track a form, the information detailing each step that the form travels must be stored in a central database that is accessible by all Informed Filler users. That way any sender of a form can retrieve the details regarding the other people to whom the form has been sent.

As a form is sent from person to person, the tracking status for the form is updated. Informed Filler does this by storing information, including the sender and recipient names, the date and time that the form was sent, and attributes that identify the form, in the tracking database. When you request the tracking status of a form, Informed Filler connects to the tracking database and retrieves the tracking details pertaining to the particular form.

Form tracking requires configuration using Informed Designer. Informed Filler can track forms using any database that is accessible via Informed data access plug-ins. These include Oracle, Sybase, and others using ODBC and DAL. Other data access plug-ins that support form tracking might be available after this documentation is published.

In order for form tracking to work, you must have the data access plug-in with which form tracking is configured installed in your plug-ins folder. For example, if the form designer has configured form tracking to store the tracking information in an Oracle database, you must have the Oracle data access plug-in installed in your plug-ins folder. You must also have the Tracking plug-in installed. These plug-ins are installed automatically when you install Informed Filler.

Depending on the type of tracking database you use, you might also require additional database client software. The installation and configuration of this software is a function normally performed by the form designer or database administrator.

Tracking Forms

If a template is configured for form tracking, any form that you send using that template will be tracked. When you send a form, Informed Filler will automatically open or connect to the tracking database and store the tracking information. In order to track a form, your computer must be connected to the network and the tracking database must be accessible. If you are not connected when you send a form (some e-mail systems allow you to send a message while disconnected from the mail server), Informed Filler will send the form, but the tracking database will not be updated.

The tracking of a form occurs after the send process has completed. During the tracking process, Informed Filler displays a progress dialog box.
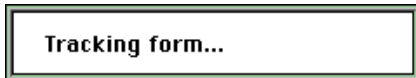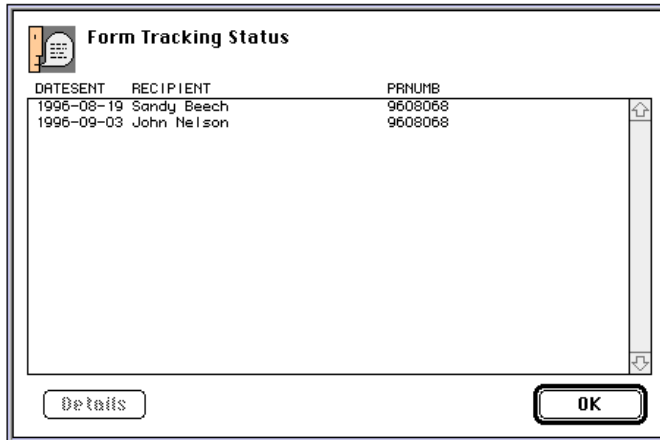
Tracking form...

Depending on how form tracking was configured for the template you are using, you might be asked to enter information necessary to connect to the tracking database. The specific dialog box that you see and the particular parameters that you are asked to enter vary depending on the type of database being used for tracking purposes. Below is the dialog box you might see if tracking is linked to a Sybase database.

Database Login For "Sybase"

User ID	gWhittaker
Password	••••••••

Cancel   OK

If you are unable to enter the information requested, please request help from the form designer or database administrator.

Displaying a Form's Tracking Status

The tracking status of a form refers to the information that details each step that a form has travelled. For example, suppose that Joe fills out a form, signs it, then sends it to Sandy for approval. Sandy then approves the form and sends it to John for final approval. At this point, the tracking information would detail the dates and times that the form was sent from Joe to Sandy, and then from Sandy to John. Since the last routing step shows that the form was sent from Sandy to John, we know that John has yet to approve the form and forward it for processing.

To display the tracking status for the current record, choose **Tracking Status...** from the View menu. Informed Filler will connect to the tracking database and retrieve the tracking information.

If no tracking information for the current record is found in the tracking database, you'll see a message indicating so.
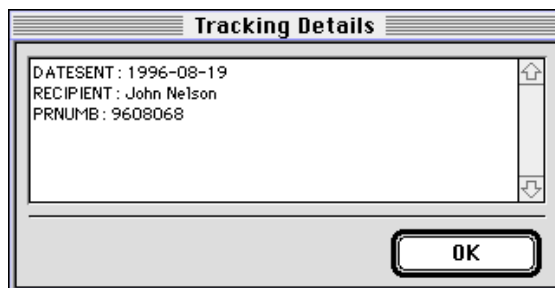
Each row on the Tracking Status dialog box corresponds to one step that the form has travelled. Depending on how form tracking was configured, you might not see all information in the width of the scrolling list. If this occurs, you can select any row in the scrolling list and click the 'Details' button to display all information for that row.

The Tracking Details dialog box includes the standard tracking information as well as any custom information that the form designer has included when configuring the form template for tracking.

As with tracking forms, you might be asked to provide connection or logon parameters necessary to connect to the tracking database when you choose the Tracking Status command. See "Tracking Forms" earlier for more information.

12

Submitting Forms

In this chapter:

12 Submitting Forms

Important steps in forms processing often involve accessing data in other information systems. When you fill out a form, for example, information might be 'looked up' in other places. When a form has been completed and approved, its data might be 'submitted to'—or stored in—some other information system.

This chapter explains how you can submit records using Informed Filler's Submit command. For information about lookups, please see "Lookups" in Chapter 3, "Filling Out Forms."

Note   Since the form designer can customize the menus you see in Informed Filler, it's possible that the Submit command has been removed or its name changed.

Overview

With paper forms, a form is submitted by re-keying its data into an information system such as an accounting system or database. With Informed, the form designer can configure form templates so that submission occurs electronically by the simple selection of a menu command or the click of a button. Electronic submission eliminates unnecessary data entry and associated errors.

An information system can range anywhere from a small database running locally on your computer, to a high capacity, high performance SQL database running on a mainframe. The form designer configures form submission in a manner that's appropriate for each type of form.

Data access standards provide standard protocols with which client applications and information systems can interact. Informed Filler includes built-in support for submitting records to information systems accessible through applications that support Apple events and AppleScript. These methods are available only on Mac OS compatible computers. Access to other information systems, such as SQL databases and desktop database formats, is available when you install Informed data access plug-ins. Data access plug-ins must be installed in your Informed plug-ins folder.

Depending on the type of database or "data destination" that you submit records to, you may also require additional database client software. The installation and configuration of this software is a function normally performed by the form designer or database administrator.

The Submit Command

Choosing the Submit command submits one or more records. The Submit command is available only if the form template has been configured for form submission by the form designer. If the form window is active, the Submit command submits the current record. If the Record List is active, all

selected records are submitted. For more information about submitting multiple records, see "Submitting Multiple Records" later in this chapter.

When Informed Filler submits a record, it first connects to the data destination for which form submission is configured. You might be prompted to enter some information, such as your name and a password, when a record is submitted. This depends on the particular type of data destination and how the connection is configured. The form designer can include the necessary connection information in the form template itself or leave it blank.

For example, for a template configured to submit to an Oracle database, if the form designer did not include a user ID and password in the template, you'll see the Oracle connection dialog box when Informed Filler submits a record.
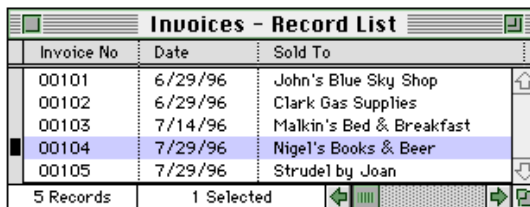
The exact appearance of the connection dialog box varies depending on the particular type of data destination that the template is linked to.

When a data destination receives a submitted record, it might reply with a message indicating that the record was successfully accepted, or it might report an error. This, again, depends on the type of data destination and the details of how form submission is configured.

Submitting Multiple Records

As mentioned previously, Informed Filler allows you to submit multiple records to the configured data destination when the Record List is active.

With the Record List in front, select the records that you want to submit, then choose **Submit** from the File menu. Informed Filler submits the selected records. If an error occurs during the submission process, a message appears indicating so, and the Submit command is halted. The record con-

taining the error, along with any remaining selected records that weren't submitted, are tagged with the tag name "Records not submitted."

For information about tagged records and how to use the Record List, see "Tagging Records" and "The Record List" in Chapter 8, "Manipulating Records."

Errors When Submitting Records

When you submit a record, it is necessary that the data destination to which the template is linked be available. If Informed Filler is unable to find or connect to the data destination, you'll see an error message indicating so.

Depending on the type of data destination, the specific error message and the options available will vary. For some data destinations, the error is described and the submission is canceled. For others, options include looking for the data destination.
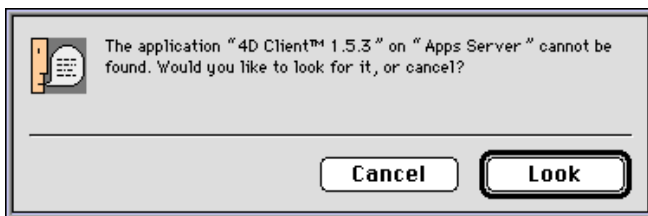
Clicking 'Look' allows you to try to locate the data destination. For example, if the data destination is an Apple event aware application and Informed Filler cannot find the application, clicking 'Look' on this dialog box allows you to browse any available Mac OS compatible computers to locate the application.

For some types of data destinations, errors can occur even when the data destination is found and a connection is made. If, for example, form submission is configured to insert information into a Sybase database and the required database table is not found or is unavailable, you'll see an error dialog even though Informed Filler is able to connect to the database server.

13 Exchanging Information

In this chapter:

13 Exchanging Information

Informed Filler allows you to easily transfer information between different Informed documents, different applications, and even different computers. You can export information to applications such as spreadsheets, accounting systems, or other databases. You can import information from other applications or computers to automatically complete forms without having to re-enter data.

Transferring information from one form or application to another is a two step process. It involves first storing the information in a file using a standard format that's understood by both the sending and receiving applications. This step is called *exporting the data*. Once the information has been exported, any application can then import it for further processing or storage.

In this chapter you'll learn about the standard file formats that Informed understands. You'll also learn how to use the Import and Export commands.

File Formats

Over time, various standard file formats have evolved to allow different applications to share the same information. Different standards exist for storing different types of information. For example, the Bitmap, PICT, EPS, and TIFF file formats are used to store graphical information, whereas the delimited text format is used to store textual information.

For purposes of exchanging information, Informed Filler supports three built-in file formats: delimited text, Informed Interchange, and Informed data.

The delimited text file format is a standard format that's used primarily for transferring information between Informed Filler and other applications such as spreadsheets, word processors, or other databases. The Informed Interchange and Informed data formats are used for transferring information between different Informed data documents. Unlike delimited text files, Informed Interchange and Informed data files can store the style characteristics of textual values (that is, attributes such as bold, italic, and outline), annotation, graphics, and signatures.

Delimited Text Files

Delimited text files offer the most common data format standard. Most applications that allow you to import or export textual information support this data format. In fact, if you're exchanging information between Informed Filler and a different application, you must use a delimited text file.

A text file is divided into lines of information. Each line contains one or more values, each separated by a *delimiter* character. A single value corresponds to one cell or field of information (for example, the invoice number on an invoice form).

Suppose that a form contains employee information consisting of the employee name, number, and salary. The following figure shows what might be the contents of a text file that contains the data for three completed employee records.

Cell names (merge format)

```
Name, Number, Salary
"Smith, John", "1092", 34500.00
"Thompson, Karen", "0019", 37390.00
"Dawson, Bill", "0420", 44100.00
```

Comma delimiters

Each cell value is separated from the next with a delimiter character. In the above example, comma delimiters are used. An application that imports a delimited text file uses the delimiter characters to separate a single line into individual values. Informed Filler supports the tab or comma delimiter characters.

Quote Characters

Often cell values are enclosed within quotation marks. This is particularly important if a delimiter character can occur within a cell's value. For example, in the previous figure, the comma character separates the first and last parts of each name value. Since the comma is also the delimiter character, it's important that each name value be enclosed within double quote characters. If quote characters were not used, the last and first names would instead be interpreted as the Name and Number cells, respectively.

When you export records, Informed Filler automatically surrounds a cell value with double-quotes if the value contains a delimiter character. When you import records, these characters are ignored. For more information, see "Exporting Records" and "Importing Records" later in this chapter.

Merge Format

In the text file shown in the previous figure, the first line contains the cell names of the information in the file. Many applications, including Informed Filler, require that this convention be followed. The cell names are used by an application that imports the text file to automatically identify the contents and organization of the file. This characteristic of a text file is often called the *merge format*.

Tables

Tables on a form contain rows and columns of information. On a form drawn with Informed Designer, each column represents one cell. Unlike field cells, a column cell can store multiple values, one for each row.

When you export a record that contains a table, Informed Filler stores the contents of the table either column-wise or row-wise. This means that the information in the table is organized either column by column or row by row. You choose which method to use by clicking a control on the Export dialog box (see "Exporting Records" later in this chapter).

If you choose to export tables by column, the rows of a column cell occur grouped together, each separated by a special row delimiter character. The ASCII code of the row delimiter character is decimal 29. The following figure illustrates how a table is exported by column.


```
Name, Telephone, Date, Amount
John Smith, (408) 555-1290, 1/23/90|2/11/90|2/15/90, 55|120.5|279.9
```

Row delimiter characters
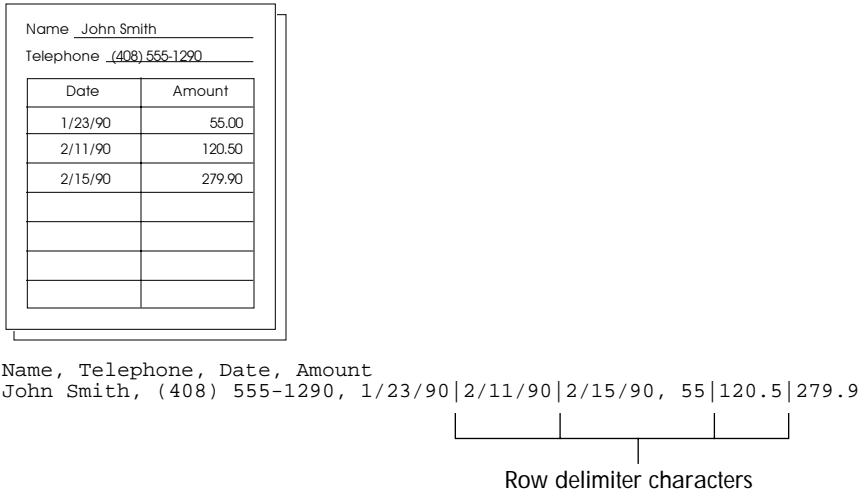
For each column, Informed Filler automatically combines the values of each row and separates them with the row delimiter character (as shown above). When you import data, the row delimiter characters are used to divide a column into individual row values.

Note   When you export records that contain tables, if you intend to later import the information using Informed Filler, you must export tables by column and not by row. Informed Filler can't import a text file that contains table information organized by row.

When you export tables by row, Informed Filler stores the information from a table one row at a time. Each row is stored on a new line in the text file. If you include a field cell when you export a table, Informed Filler will repeat the field's single value for each row of the table exported. For example, suppose that when you export the record shown in the previous figure, you choose to export tables by row instead of by column. The example below shows the text file that Informed Filler would create.

```
Name,Telephone,Date,Amount
John Smith,(408) 555-1290,1/23/90,55
John Smith,(408) 555-1290,2/11/90,120.5
John Smith,(408) 555-1290,2/15/90,279.9
```

Notice that the text file contains three lines of data, one for each row in the table. The Name and Telephone cell values are repeated on each line.

If you export a record that contains more than one table, the table with the most rows filled out determines how many rows are exported. The following example shows how a record with two tables would be exported.


```
Name,Telephone,Date,Amount,Interests
John Smith,(408) 555-1290,1/23/90,55,Golf
John Smith,(408) 555-1290,2/11/90,120.5,Music
John Smith,(408) 555-1290,2/15/90,279.9,Art
John Smith,(408) 555-1290,,,Antiques
John Smith,(408) 555-1290,,,Fishing
```

In this example, the table of interests contains more rows than the table of transactions. The text file, therefore, contains five lines of data and not three. The values of the Date and Amount column cells are left blank on the fourth and fifth lines. As always, the field cell values are repeated on each line.

The option to export tables by row is most useful when you're exporting information to a relational database application or a spreadsheet. With relational databases, the information on many forms is often represented using more than one *related* file. If you were to store the form shown in the previous example in a relational database, you might use three files—or tables—to store the client, transaction, and interest information.

When you transfer information from a form with tables to a relational database, it might be more appropriate to export and import each table separately. As you'll learn in "Exporting Records" later in this chapter, you can choose which cells to export and their order. With this ability, and with the option to export tables by column or by row, you can more easily exchange information between Informed Filler and other standard applications.

Multi-line Cell Values

As explained in Chapter 3, "Filling Out Forms," you can type more than one line into a text cell by pressing Enter or Return at the end of each line. Since the end of a line has a special meaning in a delimited text file (it separates records or rows of tables), an exported cell value cannot contain end-

of-line or carriage return characters. Therefore, when you import and export records, Informed Filler automatically converts carriage return characters to vertical tabs (ASCII code 11). Most applications, such as word processors, will interpret each vertical tab character as the end of a line.

Limitations of the Delimited Text File Format

As its name implies, a delimited text file stores textual information only. When you export records from forms with pictures or signatures, Informed Filler automatically converts picture and signature values to text. Note, however, that only Informed Filler understands the format of pictures and signatures stored in this manner. A delimited text file containing pictures or signatures, therefore, can be imported only using Informed Filler.

A stylized text value is a value that combines different fonts, sizes, and styles (bold, underline, italic, etc.). When the form is created, the form designer decides which text cells can allow style changes. As you fill out a form, style changes are made by choosing different settings from the Style submenus (see "Entering Text" in Chapter 3 for more information).

In text format, a value such as:

'This is a *stylized* text value,'

is stored as:

'This is a stylized text value.'

If it's important to preserve pictures or the style information of text, use the Informed Interchange format instead.

Chapter 7, "Annotation," explains how you can attach notes to any record. A note can be a comment or special instructions for a particular record. When you export records to a text file, all notes are ignored. You can include notes only if you use the Informed Interchange format.

Informed Interchange Files

Informed Interchange files contain the data for one or more records and are used primarily for transferring information between different versions of Informed, or between Informed Filler and other custom applications that understand this format.

The Informed Interchange file format stores all types of information, including stylized text values, pictures, signatures, and annotation. It does not, however, store any files that have been attached to a record using Informed Filler's attachments feature.

Informed Data Files

Informed data files are Informed's own proprietary format. Each Informed data file is a database that contains all the data for one or more records.

The Informed data file is not a standard format. Only Informed applications can understand and store information in this format. Although you can import files of this format, you cannot export records as Informed data files. If you're transferring information to a different (non-Informed) application, use the delimited text format instead.

Exporting Records

With Informed Filler, you export records by choosing **Export...** from the File menu. The Export dialog box appears.
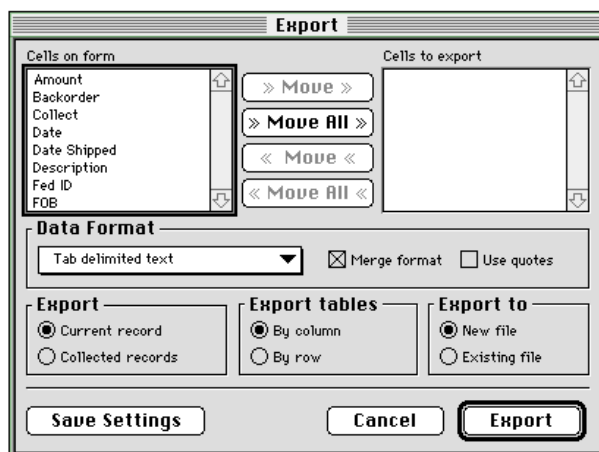
With the Export dialog box you can choose which cells are exported and in what order. You can also select a variety of export options.

Cell Selection

The Export dialog box contains two scrolling lists. The list on the left initially contains all cells on your form. The list on the right contains the cells that will be included (and their order) when records are exported. This list is initially empty. You move cells from one list to the other by clicking the buttons located between the two lists.
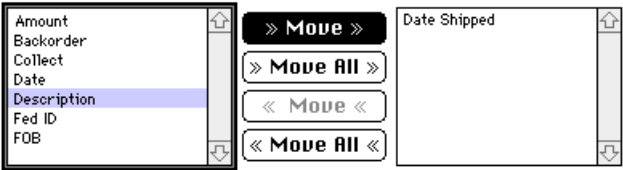
To move a single cell from one list to the other, select the cell's name in the list then click the 'Move' button that points in the appropriate direction. You can also double-click the cell's name. The cell is removed from the list in which it's currently contained and added to the other list. Cells in the left list are sorted alphabetically. Cells in the right list appear in the order that you move them to that list. Clicking a 'Move All' button moves all cells from one list to the other.

Choosing the Data Format

When records are exported, Informed Filler stores the information in a particular data format. You choose the format by selecting 'Tab delimited text,' 'Comma delimited text,' or 'Informed Interchange' from the 'Data Format' drop-down list.

When you select either of 'Tab delimited text' or 'Comma delimited text,' you can further choose whether or not to use the merge format or quotes options. If you check the 'Merge format' checkbox, Informed Filler will list each cell name on the first line of a new text file. In order to import a text file of information, some applications require that the merge format option be used.

Note   If you intend to later import the exported data back into an Informed data document (using Informed Filler), you must use the merge format option when you export the records.

When you export records, cell values that contain delimiter characters are automatically surrounded with double quotes (as in "*value*"). Delimiter characters include either of the comma or tab characters, depending on which data format you've chosen. If you select the 'Use quotes' option, all cell values with the exception of numbers will be surrounded with double quotes. If a quoted cell value itself contains a double quote, that character will be replaced with a single quote before the value is exported.

When using a delimited text format, any date, time, number, name, picture, and signature values export according to the formats listed in the following table.

Export Formats

Data type	Export format
Date	M/D/YY
Time	H:MM:SS AM
Number	General
Name	All parts in full form
Picture	Informed-specific ASCII format
Signature	Informed-specific ASCII format

Exporting Notes

As explained in Chapter 7, "Annotation," you can attach a note or comment to any form that you fill out. When you export records using the 'Informed Interchange' data format, Informed Filler lets you choose whether or not notes are to be included with the data of each record.

If you check the 'Include notes' checkbox, any notes that are attached to the records being exported will also be included. When you later import the records, all notes will automatically appear on the same pages and at the same positions as they were on the original records.

Record Selection

Informed Filler lets you export a single record or a group of records. Depending on which window is in front (the form window or the Record List window), different options will be available.

If the form window is in front, you can export either the current record—that is, the one that's visible—or all records in the collection. If the Record List window is in front, you can export all records on the Record List, or only those that are selected. Make your choice by clicking either radio button under the 'Export' heading.

New or Existing File

When you export records, you can append the information to the end of an existing file, or you can write the information to a new file. To choose an option, click either of the radio buttons below 'Export to' on the Export dialog box.

If you choose 'New file,' Informed Filler will create a new file to hold the exported information when you start the export process. You'll be asked to name the new file and specify where to store it (see "Starting the Export Process"). If you choose 'Existing file,' you'll be asked to select an existing file instead.

Saving the Export Settings

Informed Filler allows you to save the export options so that you don't have to choose them each time you export records. This is useful if you export records from the same form template using the same options on a regular basis. If you click the 'Save Settings' button, Informed Filler will remember the current settings on the Export dialog box. The next time you choose the Export command, the options will automatically configure according to the last saved settings.

Starting the Export Process

After you've selected the cells to include and the desired export options, clicking 'Export' will begin the export process. If you're exporting to a new file, you'll be asked to name the file and specify where to store it. If you're using a Windows compatible computer, you'll see a dialog box similar to the one shown in the following figure.
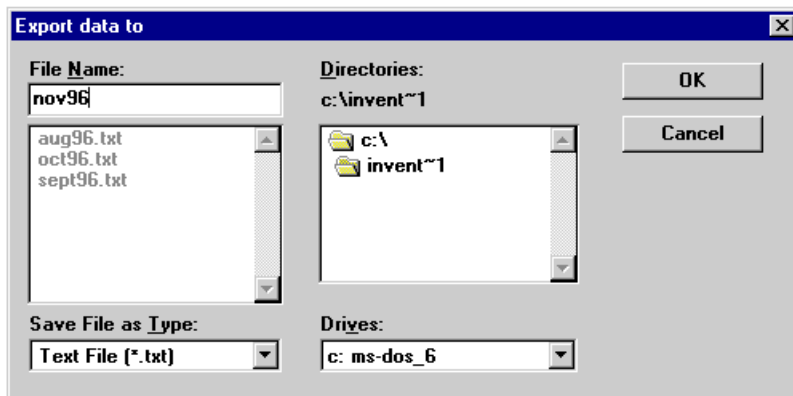
Type the name of the file in the text box provided, then click 'OK.'

If you're running Informed Filler on a Mac OS compatible computer, you'll see a dialog box similar to the one shown below.
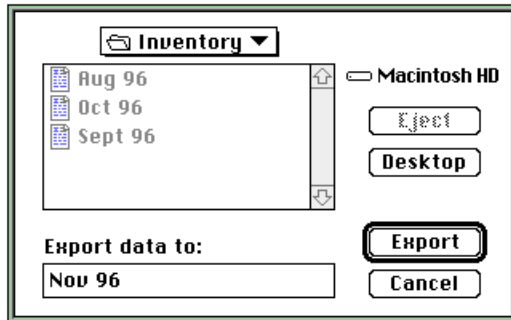
Type the name of the file in the text box provided, then click 'Export.'

If you're exporting to an existing file, you'll be asked to select the file to append the information to. If you're running Informed Filler on a Windows compatible computer, you'll see the following dialog box.
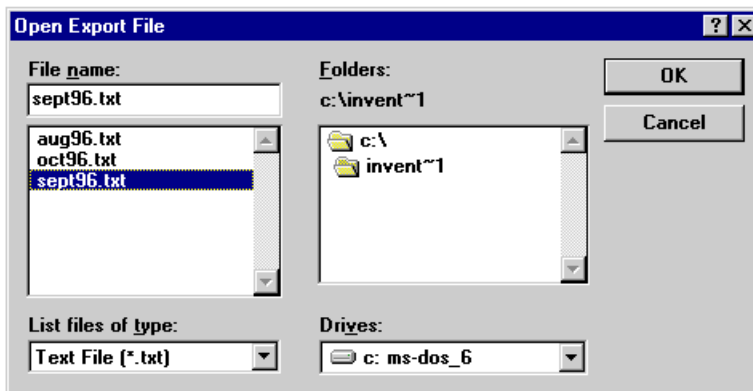
Select the file in the scrolling list, then click 'OK.'

If you're using a Mac OS compatible computer, you'll see this dialog box:
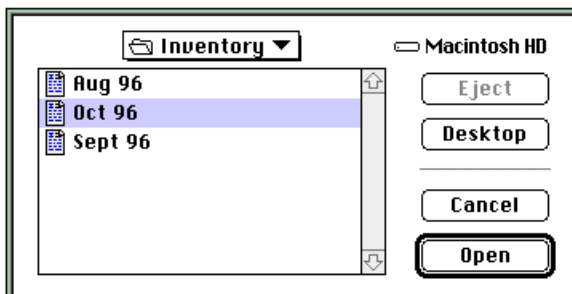
Only text files or Informed Interchange files will appear in the scrolling list (depending on the selected data format). Select the correct file, then click 'Open' to continue.

Note   When you export records to an existing file, Informed Filler doesn't check to make sure that the information you're exporting matches the information that already exists in the selected file. Therefore you could, for example, accidentally export invoice data to an existing file that contains information for purchase order forms. Please use caution when selecting the existing file.

After you create a new file or select an existing file, Informed Filler will begin exporting the records. Progress information is displayed as exporting occurs.

Importing Records

You use the Import command to import data from a file into a data document. This command offers options that make it easy to import a single file or a collection of files.

To import information into a data document, choose **Import...** from the File menu. A dialog box appears, allowing you to select which files to import.

If your computer uses Windows, you'll see the standard Open dialog box:
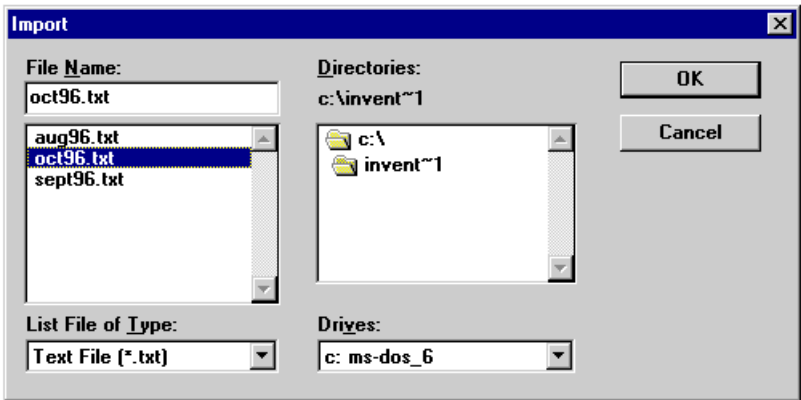
Select the file format that you want to import from the 'List File of Type' drop-down list. This list contains the Informed data, Text File, and Informed Interchange formats.

The scrolling list of files will show only those files that match the selected data format. For a description of the built-in data formats, see "File Formats" earlier in this chapter.

Select the file in the scrolling list and click 'OK' to import the data.

If you're using the Mac OS, you'll see one of two dialog boxes when you choose the Import command. If your computer has System 7.0 or later, you'll see a dialog box that allows you to select more than one file to import.
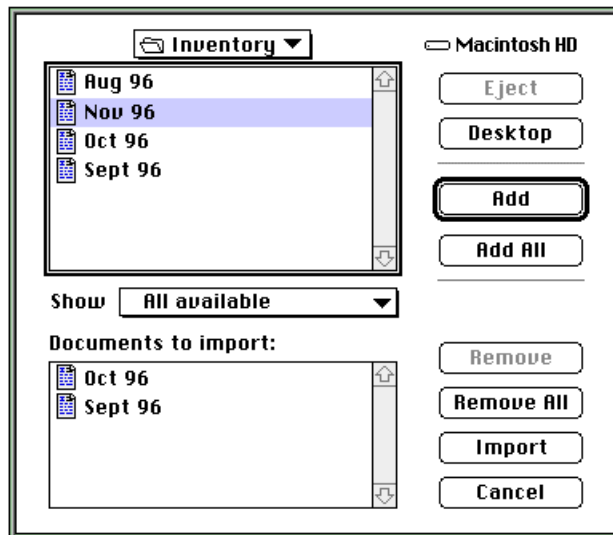
Select the file format that you want to import from the 'Show' drop-down list. This list contains the Informed data, Delimited Text, and Informed Interchange formats. Once you specify a file format, you'll only be able to select files that match that format.

To select a file to import, click it in the upper scrolling list, then click 'Add,' or simply double-click the file. The name of the selected file appears in the lower scrolling list. To add all files in the current folder, click 'Add All.' To remove an item from the list of those to import, click the file in the lower scrolling list, then click 'Remove,' or simply double-click the file. To remove all the files that you've selected, click 'Remove All.' Once you've made your selection, click 'Import' to import the files, or click 'Cancel' to cancel the Import command and dismiss the dialog box.

If your Mac OS computer has system software earlier than version 7.0, the dialog box that you'll see only allows you to select and import one file at a time.

If you're using a Mac OS computer compatible computer, Informed Filler offers a shortcut to the Import command. To import a data document, simply drag its icon onto the form window that corresponds to the data document that you want to import into.

The Import Process

When Informed Filler imports a file, it starts by comparing the contents of the file with the form template used by the data document into which the data is being imported. By reading header information in the selected file, Informed Filler can identify and match the cells found in the file with those on the form template. If no cells match, the Import command is cancelled and the following message is displayed.
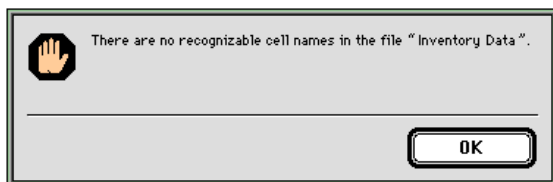
If the above error occurs, it's likely that you've selected the wrong file to import. For example, you may have attempted to import a file containing inventory data into your purchase order form.

If at least one cell matches but there are extra or missing cells in the file being imported, you'll see either or both of the following messages.
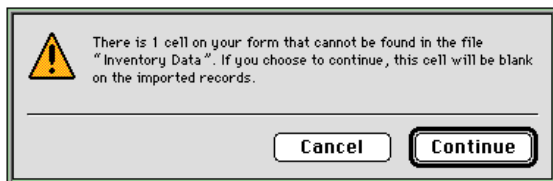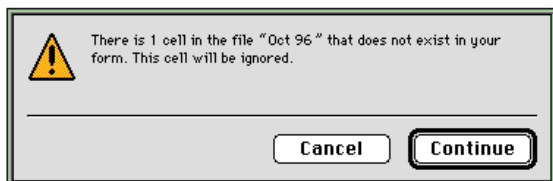
These messages are meant to warn you that the data in the file being imported doesn't exactly match the form template used by the data document that you're importing into. Either cells on your form cannot be found in the file, or cells in the file are found that don't exist on your form. Click the

appropriate button to continue or cancel. If you choose to continue, any unrecognizable cells in the file being imported will be ignored. Cells that appear on your form but are missing in the file will be blank for the imported records.

Note   If a cell on your form is not found in the file being imported, and that cell has a default value, the cell won't be blank for the imported records. Instead, the default value will be used.

As records are imported, Informed Filler displays progress information.

You can cancel the import process by clicking 'Cancel.'

As each record is imported, Informed Filler checks to make sure that the data read matches with what is actually expected. It checks for extra or missing values, and for values that are incorrect in type. As an example, consider the comma delimited text file shown below.

```
Name,Phone,Salary,Title,Start Date
"Smith, John","498-0938",35950,"Product Filler","3/21/89"
"Robertson, Dale","439-6628",39200
"Jones, Tom","482-7139",31990,"Senior Editor","9/17/89"
"Harrison, Karen","42-1099",42500,"Area Supervisor","3/18/88"
"Dawson, Janice","420-1029",28770,"Sales Rep.","abcdefg"
"Roy, Dan","487-3092",33290,"Analyst","1/7/90","An extra value"
```

Assume that the form into which the file is being imported contains the cells called 'Name,' 'Phone,' 'Salary,' 'Title,' and 'Start Date.' Also assume that these cells have the respective types name, character (with a format that accepts valid phone numbers only), number, date, and text. The following table lists the errors that Informed Filler would recognize while importing the previous text file.

Errors in Text File

Record	Is Correct?	
1	yes	
2	no	missing values for Title and Start Date
3	yes	
4	no	invalid value for Phone
5	no	invalid date value for Start Date
6	no	too many values

This table lists three types of detectable errors: too many values, not enough values, and invalid values. In addition to these errors, Informed Filler will also warn you when the number of values for a column cell exceeds the number of rows in the corresponding column on your form. In any case, when an error is detected, you'll see a message that describes the error and offers three options.
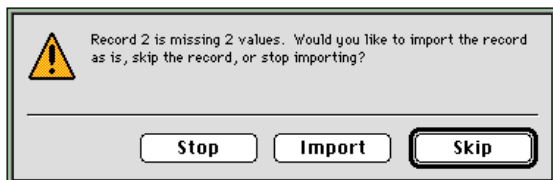
If the file being imported is an Informed Interchange file, the name of the user who originally exported or stored the record might appear on the message dialog.

When an error is detected, you can choose to import the record anyway, skip the record and continue, or stop the import process. If you choose to import the record, any extra values are ignored. Missing or invalid values will be blank on the imported records.

If any errors were detected, Informed Filler will report the number of records imported and the number of errors detected after all forms have been imported, or after you cancel or stop the import process.

Importing Notes

Chapter 7, "Annotation," describes how you can attach a note or comment to any record that you fill out. As explained in "Exporting Notes" earlier in this chapter, Informed Filler can export notes along with the data of each record if you use the Informed Interchange data format.

When you import records from an Informed Interchange file or an Informed data file, any notes found with the records are imported as well. Informed Filler tries to position the notes on the form according to where they were originally located. However, realize that this position is relevant only if the data document you're importing the records into uses a form template that matches the one that the notes were originally attached to. If you're transferring information between two different types of forms, the original position of each note might not be meaningful.

If a note was originally positioned on a page that doesn't exist in the form template of the data document that you're importing into, instead of deleting the note, Informed Filler will automatically move it onto the work page. (For an explanation of the work page, please see "The Work Page" in Chapter 3.)

14 Form Template Distribution

In this chapter:

14 Form Template Distribution

Once a form is designed, it is distributed to the Informed Filler users who fill it out. Forms distribution can be a significant cost for many organizations. Users must be notified of new form templates and these templates must be obtained before they can be filled out. The distribution of new versions of existing form templates can be even more costly due to the frequency with which templates are revised.

This chapter explains the form template distribution features that are built into Informed Designer and Informed Filler.

Background

Informed Filler allows form templates to be accessed either locally on your computer's hard disk, or via a network file server. The location that Informed Filler looks for templates is, by default, in a folder named "TEMPLATE" (Windows) or "Templates" (Mac OS) located in your Informed folder. This location can be specified and changed using Informed Filler's Preferences command. For more information, please see "Moving Folders" in Chapter 1 of this manual.

Storing templates locally means that you can use the templates any time, even while disconnected from the network. Storing templates locally, however, means that you must copy the templates that you want to use to your hard disk both when the template is first created, and each time the template is revised.

Accessing form templates from a central file server simplifies distribution. When a new template is designed, the forms designer places the template in the appropriate directory or folder on the designated file server. When a template is revised, the existing template on the file server is replaced with the new one. To fill out forms, however, you must have access to the file server.

How it Works

When using Informed's built-in distribution features, the distribution of a form template is done via one or more distribution centers and assumes that you are storing templates locally for use with Informed Filler. A distribution center is a place where distributed form templates are stored. The forms designer maintains the distribution centers and the distributed templates that are available at each center.

Informed supports different types of distribution centers. Access to a particular type of distribution center is provided through an Informed distribution plug-in. At the time this documentation was prepared, Informed Designer and Informed Filler included distribution plug-ins for accessing file

servers and FTP servers. By using plug-ins, Shana can easily support a new type of distribution center by simply developing a new distribution plug-in.

For information that is specific to the particular distribution plug-ins supported by Informed Filler, please see the document "FILLPLG.PDF" (Windows) or "Informed Filler Plug-ins" (Mac OS). This document is installed automatically when you install Informed Filler and is viewed using Acrobat Reader (also included with Informed Filler).

In order to access a particular distribution center, you must have a distribution center profile for the center. A distribution center profile identifies a distribution center and includes the information necessary to connect to the center.

The forms designer creates the distribution center profiles for the distribution centers used in your organization. These files must be installed in your "DISTCTRS" (Windows) or "Distribution Centers" (Mac OS) folder. This folder is found in your "PREFS" (Windows) or "Preferences" (Mac OS) folder which, by default, is located in your Informed folder.

Accessing Distribution Centers

Informed Filler makes it easy to access distribution centers to obtain new form templates. When you choose the New Document command from the File menu, the dialog box that appears provides controls for accessing distribution centers and selecting distributed form templates.
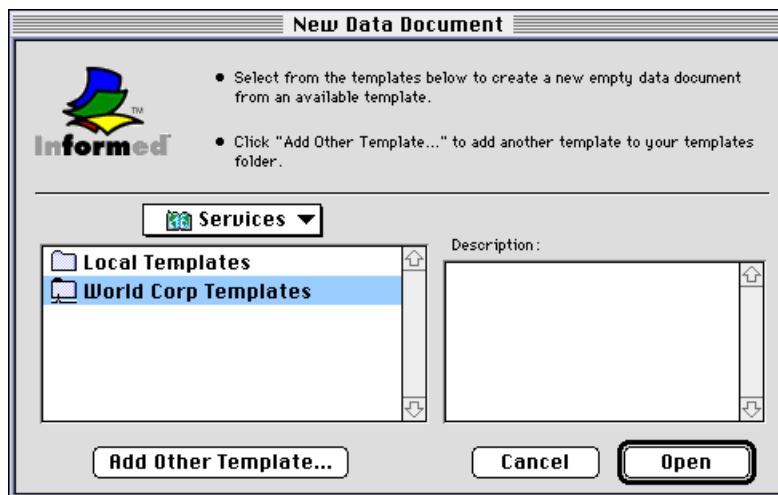
Choosing 'Services' from the drop-down list reveals the distribution centers that correspond to the distribution center profiles that are installed in your distribution centers folder. The details of selecting distributed templates can be found in Chapter 2, "Manipulating Documents".

Once you've selected a distributed template, Informed Filler will copy it to your templates folder. The template is then available for use to fill out and manipulate forms.

As also described in Chapter 2, "Manipulating Documents," when you open a form data document, Informed Filler examines the Template ID inside the document to determine which template is required to view and manipulate the form data. It then searches in your templates folder for a template with a matching Template ID. If the required template is found, it is automatically opened along with the data document. If the required template is not found, and distribution information is found in the data document, Informed Filler will automatically connect to the distribution center and obtain the template. If the data document does not contain the distribution information needed to obtain the template, you are presented with a dialog box similar to the New Data Document dialog box. With this dialog box you can access a distribution center and select the appropriate form template to use.

Checking for Revisions

Included in a distributed form template is a distribution list for the template. A distribution list is a list of distribution centers at which the template is available. From time to time, Informed Filler will automatically connect to a distribution center and check the distributed template to see if a new version is available. The forms designer specifies how often a revision check occurs. If permitted by the form designer, you can change this setting with Informed Filler's Preferences command. Choose **Preferences...** from the Edit menu and click the Revisions icon to display the Revisions panel. The Revisions panel is available only if the form template is a distributed template.
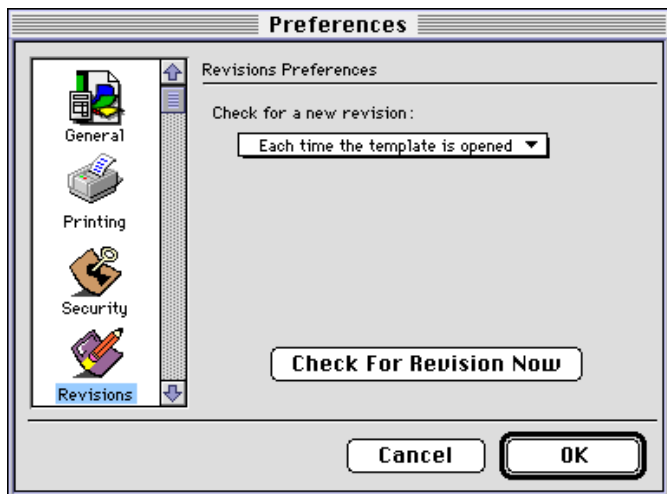
The settings available in the 'Automatically check for a new revision' drop-down list include:

- ◻ Each time the template is opened
- ◻ Once every day
- ◻ Once every week
- ◻ Once every month
- ◻ Never

If you select the 'Never' setting, Informed Filler will not do automatic revision checking. With this setting, the only way to check for a new revision is to click the 'Check For Revision Now' button on the Preferences dialog box.

Note   The form designer can lock this setting so that you cannot change it. If the setting is locked, you will not be able to choose a different setting.

The distribution list for a template can include more than one distribution center. The forms designer may have made the distributed template available at multiple distribution centers so that if operation of one center is interrupted, the distributed template can be accessed at a different center. When a revision check occurs, Informed Filler will attempt to check the distributed template at the first distribution center in the list. If this distribution center is inaccessible, it will try the next center in the list, and so on, until the revision check is successful. If Informed Filler is unable to connect to any of the centers in the template's distribution list, a message will appear indicating so. The message you see might be the one shown below, or it might be a custom message specified by the form designer.
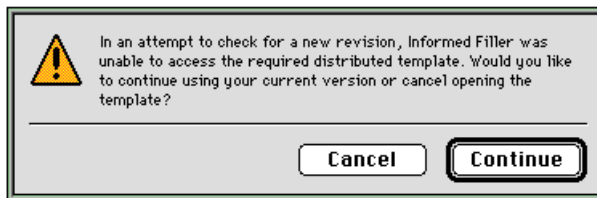
To skip the revision check, click 'Continue.' Informed Filler will open and use your current version of the template. To cancel opening the template, click 'Cancel' instead.

If a revision check occurs and Informed Filler detects that a new revision of the template is available (that is, the revision number of the distributed template at the distribution center is different from that of the template in your templates folder), you'll be notified with a message.

Your options are to update your copy of the template with the new revision, ignore the new revision and continue using your current version, or cancel the operation. Click the button of your choice.

If you choose the Update option, Informed Filler replaces your template with the new version. If the new version includes changes that affect the information that is contained on the form, Informed Filler will update the data in the active data document to reflect these changes. For more information, see "Updating a Data Document" in Chapter 2, "Manipulating Documents."

Revision Status

Each form template has a status and a status message. The forms designer sets these to provide you with an indication of the intended use of the template and any associated cautions. To see the status and status message for the active template, choose **Revision Status...** from the View menu.
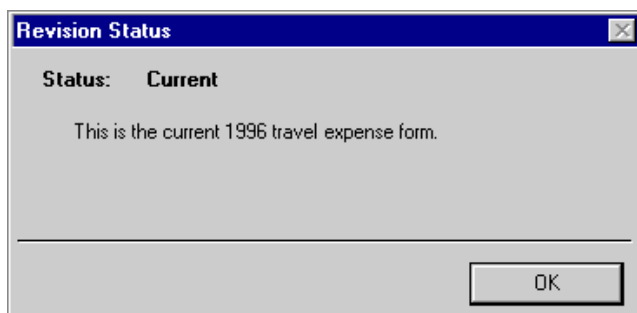
The template's status can be one of: Current, Non-current, or Discontinued. Each status has an implied meaning. Current implies that the template is the most up-to-date version. Non-current is intended to imply that a newer version of the template is available, but you can still fill out forms using the non-current version. The discontinued status implies that the template has become obsolete and should no longer be used to fill out new forms.

To remind you of a template's current status, the forms designer may configure the template to automatically display the status and status message whenever you request to add a new record. Furthermore, for discontinued templates, the forms designer can prevent you from adding new records.

Appendix A

Name Prefixes and Suffixes

Appendix A - Name Prefixes and Suffixes

As described in Chapter 3, "Filling Out Forms," Informed Filler allows you to store names using the name cell type. With the name cell type, Informed Filler always displays a name according to the cell's format, even if you enter a name differently. For more information, see "Entering Names" in Chapter 3.

In order to identify the different parts of a name, Informed Filler uses the list of prefixes and suffixes shown in the following tables.

Prefixes

Full Prefix	Abbreviation	Full Prefix	Abbreviation
Abbot		Congresswoman	Cong.
Admiral	Adm.	Corporal	Cpl.
Airman	Amn.	Count	
Ambassador		Countess	
Archbishop		Dame	
Archdeacon		Doctor	Dr.
Army		Duke	
Assemblyman		Duchess	
Assembywoman		Excellency	
Assistant		Ensign	
Associate		Father	
Attorney		First	
Baron		Fleet	
Baroness		General	Gen.
Baronet		Governor	Gov.
Bishop		Grade	
Brigadier	Brig.	Her	
Cadet	Cdt.	Highness	
Canon		His	
Cantor		Holiness	
Captain	Capt.	Honorable	Hon.
Cardinal		Judge	
Chairman		Justice	
Chairperson		King	
Cancellor		Knight	
Chaplain		Lady	
Chief		Lieutenant	Lt.
Colonel	Col.	Lord	
Commander	Comm.	M.	
Commodore		Madame	
Congressman	Cong.	Majesty	

Prefixes (continued)

Full Prefix	Abbreviation	Full Prefix	Abbreviation
Major	Maj.	Rabbi	
Marchioness		Rear	
Marquess		Representative	Rep.
Mayor		Reverend	Rev.
Midshipman		Right	Rt.
Minister		Royal	
Miss		Seaman	
Mister	Mr.	Second	
Most		Secretary	Sec.
Mother		Senator	Sen.
Mrs.		Sergeant	Sgt.
Ms.		Sir	
Navy		Sister	
Of		Specialist	Spec.
Officer		The	
Patriarch		Third	
Pope		Under	
President	Pres.	Very	
Prime		Vice	V.
Prince		Viscount	
Princess		Viscountess	
Private	Pvt.	Warrant	
Professor	Prof.	Yeoman	
Queen			

Suffixes

Full Suffix	Abbreviation	Full Suffix	Abbreviation
Junior	Jr.	D.D.S.	
Senior	Sr.	D.V.M.	
Esquire	Esq.	J.M.	
First	I	LL.B.	
Second	II	M.A.	
Third	III	M.B.A.	
Fourth	IV	M.D.	
Fifth	V	M.Ed.	
B.A.		M.S.	
B.Comm.		P.Eng.	
B.Ed.		Pharm.	
B.Sc.		Ph.D.	
C.A.		R.E.T.	
C.P.A.		R.N.	

Appendix B

Using AppleScript

Appendix B - Using AppleScript

AppleScript is a scripting language that allows you to control Mac OS applications with program-like scripts. Rather than using the keyboard and mouse, you can write scripts to perform tasks. With Informed Filler, a task can be as simple as opening and printing a form, or as complex as controlling sophisticated workflow processes.

With Informed and AppleScript you can:

- automate tasks
- customize forms
- integrate Informed Filler with other Mac OS applications

This appendix provides an overview of Informed's scripting capabilities and describes how Informed Filler can trigger scripts when you perform certain actions.

This appendix is not intended to explain how to write scripts. To learn how to write scripts, you should first read the *AppleScript Language Guide* (included with the AppleScript Software Development Toolkit). You should then refer to Chapter 12, "Using AppleScript," in the *Informed Designer Forms Automation* manual.

Informed and AppleScript

Without AppleScript, you accomplish tasks with Informed Filler by interacting with its graphical user interface—that is, by choosing commands, activating controls, entering information, and so on. With Informed Filler and AppleScript, you can write scripts to accomplish the same tasks.

A single script can automate a task that normally requires several manual steps. For example, you could write a script which searches for and prints all California invoices that exceed 500 dollars. A different script could add a new record to a purchase order data document and fill it in with information from one or more purchase requisition forms. Performing such tasks becomes as simple as selecting a script.

An important feature of AppleScript is its ability to integrate many different scriptable applications. By controlling different applications, a single script can effectively combine different features from different products to provide more powerful solutions. You could, for example, write a script which instructs Informed Filler to collect information from different forms, chart the information using a spreadsheet application, then insert the results into a letter using a word processor.

You write scripts using a script editor or applications such as Informed Designer. The script editor that comes with AppleScript stores scripts in script documents. The script in a script document can be played by double-clicking the document's icon.

The form designer can store scripts in a form template. That way, whenever you transfer the template to another person, the scripts remain part of the form. Applications that can store scripts, such as Informed Designer and Informed Filler, are often called *attachable* applications. This is because scripts can be *attached* to particular actions in the application. When you perform an action, the application triggers a script.

With properly configured form templates, Informed Filler can trigger scripts when you perform the following actions:

◻ choose a menu command
◻ click a button on the form
◻ type a value in a lookup cell

You don't actually see the scripts themselves while using Informed Filler. You do, however, see their effect whenever you trigger a script by performing one of the actions listed above.

Informed Filler's AppleScript capabilities work only if AppleScript is installed on your computer.

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